

Local 2001

New Zealand Television

Content

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Chairman's Introduction

This year, we passed a significant milestone - 10,000 hours of New Zealand television have now been produced with funding support from New Zealand On Air. It's an opportune time to take stock of the television environment now, and to reflect on the outcomes of the past years.

The 2001 Local Content Report from NZ On Air contains a picture of thirteen full years of local content, since our organisation was established in 1989.

Great audience outcomes – in terms of quality, diversity and relevance - have been produced from competitive relationships that have been stimulated within the broadcasting sector, and our vibrant production industry.

Prime time television has a stronger local flavour than ever before, and significant progress has been made in the genres of New Zealand drama, including children's drama, documentary, Maori programming, entertainment programmes and documentaries.

But, as this survey shows, the face of local content is changing significantly.

The amount of local sports programmes on the main free-to-air networks has decreased dramatically since the highs of the early 1990s.

Relatively low cost genres such as information, entertainment, news and current affairs programming are showing the strongest increases over time.

The hours of highly subsidised genres (which also tend to be high cost and high risk) such as drama, comedy, documentary and children's programming are remaining static and are decreasing as a proportion of the overall total.

In recent years we have also observed a decline in the proportion of local content which has been made with NZ On Air funding. This trend continues in 2001 with NZ On Air contributing to only 17.8% of the total local content hours, compared to 20% in 2000 and 25% in 1997.

When this is considered alongside the fact that overall local content remains stable, we can see that broadcasters are contributing solidly to total local content, with more programmes produced without a subsidy.

However such programmes are generally more commercial, or lower cost, than NZ On Air funded genres.

The increase in broadcaster-funded hours once again underlines the fact that there is no unwillingness on the part of broadcasters to screen local programming.

It follows that the factor limiting the level of local content is its cost.

A market the size of New Zealand's struggles to compete with off-the shelf programming from larger markets that can be purchased at a fraction of the cost of local programmes.

The decline in the number of NZ On Air funded hours also indicates what became truly apparent in 2000: that NZ On Air has gone well beyond the point of maximum sustainable yield.

In other words, the choices are either to hold budgets and maintain target hours or to accept that fewer hours will be produced in order to allow for programmes with higher on-screen production values.

What does this tell us? It tells us that there is a significant and growing body of local programming that stands on its own two feet – that exists without the support of a public subsidy.

But over the years it becomes more and more clear where the public funding is adding value. As the pressure has gone on NZ On Air's funding, it has increasingly focused its available funds on the at-risk genres identified above: children's programmes, drama and comedy and documentary programmes. In these areas, the public funding made available through NZ On Air is the main – and sometimes the only – funding source for programmes.

If an increase in this sort of programming is sought, then the funding available for it must also increase – whether through an increase in public funding or through other means.

NZ On Air has conducted this Local Content Survey since its first year of operation in 1989. The survey tracks the quantity of locally made television programmes being screened on national free-to-air channels each year, as a proportion of the whole television schedule. It tallies up programmes by genre, and measures such factors as how much of the local content was first-run, how much was repeats, how much was screened in prime time, and how much in off peak hours.

Although it provides a means for comparing from year to year how much locally made television there is in each genre, it does not set out to judge the comparative value of these programmes, or any changes in quality and value over the years.

We have made changes over the years to keep it relevant, and each year NZ On Air conducts market research to add some qualitative analysis to this quantitative measure.

So what does the Local Content survey for 2001 tell us?

Local content overall remained static in 2001 – remaining very close to its all-time high (reached in 1998).

The amount of New Zealand content in prime time hours increased slightly (37.2 percent of the total schedule, compared with 36.5 percent in 2000).

These results were achieved despite a marked drop in sports in 2001 - 450 hours fewer than the total in this genre for the year 2000. This is partly attributable to a lack of a major event such as the Commonwealth Games, Olympics or The America's Cup in 2001.

Genres that grew to more than compensate for the decline sports content, were news and current affairs, and information programming.

In fact, 2001 saw a notable increase in the amount of news and current affairs on all channels. The increase was partly due to programming changes, and partly influenced by the events of September 11.

The genres for which NZ On Air funding is the main contributor – drama and comedy, children's programming, and documentary – showed varied results.

Drama and comedy remained static overall, but first run hours of drama and comedy increased significantly, thanks to programmes such as *Mercy Peak*, *Street Legal*, *Spin Doctors* and *Lawless*. TV2

continues to be the strongest supporter of local drama. TV3's drama hours dropped overall (due to a decrease in repeats), but its commitment to this genre in prime time increased nearly three fold.

The number of children's programming hours dropped again in 2001, continuing a decline that began in 1992. NZ On Air is the main contributor to children's and young person's programmes. Broadcasters will not commission this genre without considerable financial assistance.

Total documentary hours increased in 2001, up to 260 hours, from 242 in 2000. This figure is attributable to increases on both TV One and TV2, and comes despite a further decrease on TV3.

Programmes made by and for Maori continued to increase. The majority of programming included in this category is funded by Te Mangai Paho, and screened on TV One.

This year's results should come as no surprise. There is some good news and some bad.

Local content is holding its own on the three free to air national channels, and as a percentage of prime time programming continues to increase.

But within that mix, it is the low cost, information and entertainment programming that has grown.

Looking ahead, the continuing decline of locally made programmes for children on our major networks has to be one of our greatest concerns.

Less than eight percent of the local content, and less than 2% of the total programming schedule on our major free-to-air networks are designed to meet the needs of New Zealand children today, New Zealand's citizens tomorrow.

It's a sobering note to close on, but it is the challenge for us all as we look ahead to the next 10,000 hours of New Zealand television production.

David Beatson

Chairman

March 2002

Executive Summary

The main trends in the screening of New Zealand-produced programmes on the three nationwide television channels in 2001, since the last local content survey of 2000 programmes, were:

Hours

- Total hours of local programmes remained static with 6190 hours in 2001 compared to 6187 in 2000. (refer fig 1)
- Total first-run hours (prime time and offpeak) decreased slightly from 5182 in 2000 to 5151 hours in 2001(refer fig 2)
- Total repeat hours increased by 35 to 1039 hours (refer fig 4)
- These fluctuations mean that, overall, local content remained static, comprising 23.6% of the total broadcast hours in 2001, compared to 23.5% in 2000 (refer Appendix 3)
- News and Current Affairs remains the single largest local content genre, comprising 33% of total local hours, an increase of 3% on 2000 (refer Appendix 3)

Channel Output (refer Appendix 2)

- As a percentage of their total broadcast hours (24 hours a day) channel output was relatively static:
 - TV One screened 35% first-run local content, a 2% decrease over 2000 figures
 - TV2 screened 11% first-run local content, up 2% on 2000
 - TV3 screened 13% first-run local content, a static result.
- As a percentage of their prime time hours (6pm – 10pm):
 - TVOne screened 54% first-run local content (54% in 2000) and 17% when news and current affairs are excluded.
 - TV2 screened 20% first-run local content (19% in 2000) and 20% excluding news.
 - TV3 screened 37% first-run local content (32% in 2000) and 10% when news and current affairs are excluded.

Channel Increases

- TV2 increased first-run output in Children's, Entertainment, Information, Documentaries and Sport.
- TV3 increased first-run hours in News, Information, Drama/Comedy and Maori Programming.
- TV2 increased prime time local content hours by 19 on the previous year.
- TV3 increased its prime time local content hours by 8 on the previous year.
- TV2 increased off peak entertainment hours by 85.
- TVOne increased first run Maori programming by 19 hours.

Channel Decreases

- TV3 decreased total local content hours by 186
- TVOne experienced a drop in first-run local content hours for the first time since 1995.
- TV3 lowered sports coverage by 99 hours, with a 57 hour decrease in primetime.
- TVOne slightly decreased prime time hours from 803 in 2000 to 795 in 2001.

Other (refer Appendix 7, 10 and 11)

Of the two 'semi-national' free-to-air channels (TV4 and Prime), Prime screens a comparatively high level of local content, 697 total hours (up 44 on 2000) comprising the 'infomercial' *Prime Living* plus local sport and local news. The channel does not broadcast for twenty-four hours and 40% of its local content hours are repeated programmes (up from just over one third last year).

TV4 screens very little local material. Its total local output in 2001 was 186 hours, which is an increase of 21 hours on 2000. In 2001 only 51 hours, or 27%, of this total was made up of repeat programmes, compared with 61% for 2000.

Of the Sky pay TV channels, Sky Sport and Trackside continued to carry the majority of local content, screening 17.9% and 22.6% respectively in 2001. HBO continued to screen very low levels of local content but the *Sundance* channel made up for this by screening 60 hours of local feature film and feature documentary reruns.

The impact of the reduced spending power of NZ On Air remains evident. NZ On Air contributed funding for 17.8% of the total New Zealand hours in 2001 (1103 hours), compared with 20% in 2000, 21% in 1999, 23% in 1998 and 25% in 1997.

NZ On Air contributed towards 11% (544 hours) of 2001's first-run hours, compared with 14% (731 hours) in 2000, 15% to 1999's first-run hours, 16% in 1998 and 18% in 1997.

Thirteen Years Of Local Content

This survey has measured the hours of local content on the three nationwide channels (TV One, TV2 and TV3) since 1989 with the first local content report covering two years. In addition, local content on some non-national operations has been collated for the last five years and some brief comments on this are contained in section 8 of this report. This recognises that, since the beginning of this survey, the television environment has expanded significantly.

In 1988, two channels were broadcasting and neither transmitted for twenty-four hours a day. Total broadcast hours nearly doubled in 1990 with the introduction of the third nationwide channel. In 2001 the television environment is markedly different, with competition to the three free-to-air national services deriving from:

- two free-to-air channels with around 70% national coverage (TV4 and Prime TV)
- over 40 pay television channels offered by TelstraClear and Sky, with TV3, TVOne and TV2 now all carried on the Sky platform. At time of writing TelstraClear had reached agreement for Sky to provide pay television services to its Wellington subscribers.
- independent free-to-air regional television comprising several small local ventures from north of Auckland to Southland, including two in Christchurch
- one community channel, Triangle TV, in Auckland

In this environment, the overall amount of New Zealand programming on the free-to-air national television networks has nearly tripled, rising from 2111 hours in 1988 to a high of 6296 hours in 1998. As Figure 1 demonstrates, since 1998 local content levels have reached a plateau.

In 2001 plans were made for another player to enter the market. A board has been appointed and funding made available for the set-up of a Maori channel which is expected to commence operation in the second half of 2002.

2001 Results: Total Hours

Total New Zealand programme hours broadcast on TV One, TV2 and TV3 remained static. In 2001 the total hours were 6190 compared with 6187 for 2000. This increase was not enough to dramatically alter the percentage of local content which was 23.6% in 2001 compared with 23.5% in 2000.

TV One

- screened 3587 hours in 2001 (up 43 hours)
- screened more than double the local content hours of both TV2 and TV3
- improved in first-run Drama/Comedy hours from just 5 hours in 2000 to 21 hours in 2001
- decreased its first-run local content by 164 hours
- broadcast 3071 hours of first run local content (35% of its total broadcast hours), down 2% on 2000

TV2

- increased its total hours of local content screened by 12.7% (up 147 hours to 1305 hours in 2001)
- gained considerable ground in its first-run local content, up 133 hours to 934
- increased its prime time local content by 27 hours
- recorded significant genre increases in off peak entertainment hours (up 95) and children's (up 23)
- significantly increased repeats of entertainment shows (up 60 hours)
- continued to be well ahead of TVOne and TV3 in the screening of New Zealand made drama and comedy
- increased first run children's hours by 23, achieving 294, but lowered total children's hours by 46 due to a decrease in repeats
- broadcast 934 hours of first-run local content (11% of total broadcast hours), up from the previous year's 801 hours (10%)

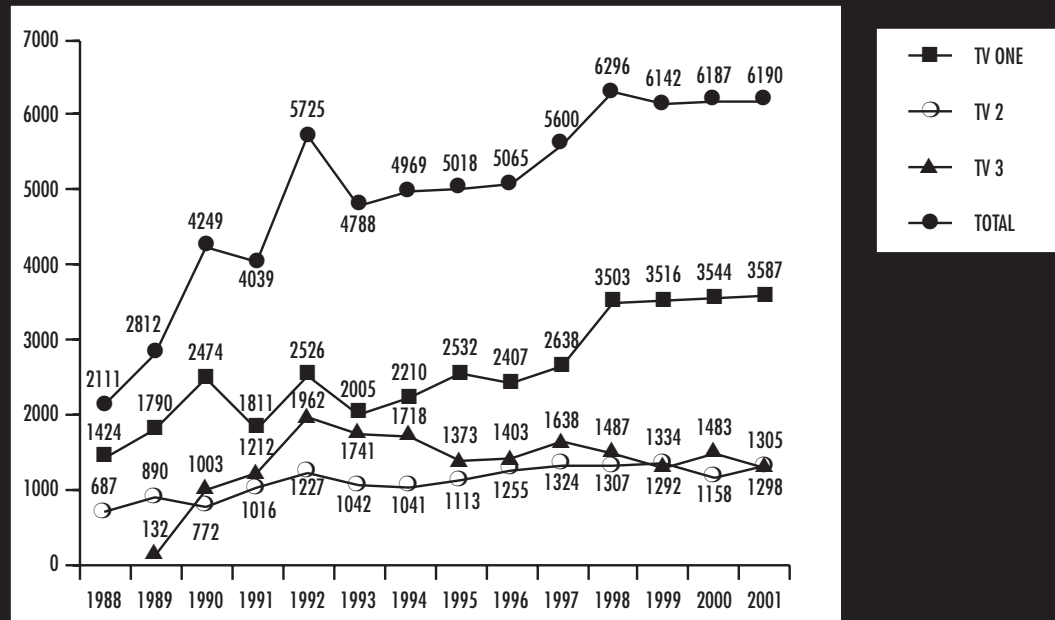
TV3

- lost the ground it gained last year, losing 185 local content hours to achieve a total of 1298 hours (a 12.5% decrease), this decrease was largely due to a significant decrease in prime time sports, fewer entertainment repeats and fewer off peak entertainment hours
- screened 28 hours of first-run Drama/Comedy, an improvement of 18 hours on 2000
- decreased the number of children's hours due to decreases in both first-run and repeated children's programming
- retained the 13% of its total broadcast hours that are made up of first-run local content (1145), a static result when compared with 2000.

Appendix 2 sets out the total hours results for TV One, TV2 and TV3 in 2001.

Fig
1

Total NZ hours by channel



Appendix 3 sets out total hours of New Zealand programming by genre from 1988 to 2001 (comprising first-run and repeats across all three channels). Comments on specific genre variations between years are made in section 8 below.

Appendices 4, 5 and 6 list the New Zealand programmes which make up the raw data for this study, for TV One, TV2 and TV3 respectively. The programme titles for series appear **only on their first week of transmission**.

These figures cannot be precisely compared with TV figures from other countries because measuring systems differ. However, for the second time we have prepared a comparison with Australia's local content figures. Australia's quota figures exclude transmitted hours between 12.00 midnight and 6.00am, and are applied to the three commercial channels - Seven, Nine and Ten Networks.

In 2001, between 12.00 midnight and 6.00am:

- TVOne screened 4 hours of repeat programmes
- TV2 screened 160 hours of programming, including repeat programmes and M2
- TV3 screened 5 hours of repeats and 5 hours of first-run cricket

1 Because M2, TV2's significant new music programming initiative, screens between midnight and 6am it is excluded from this calculation.

Excluding these totals, and based on the Australian model of an eighteen hour clock the percentages of local content screened become:-

- TV One 54.5 % (53.6% in 2000)
- TV2 17.4% (17.3% in 2000)
- TV3 19.6% (22.5% in 2000)¹

This simple analysis shows that TV One is almost at the level of local content achieved by quota regulation in Australia (55%), but the other two national, free-to-air channels have a long way to go. It should be noted however that, apart from short newsbreaks, twice a day, TV2 does not carry a news service. When the average level of local content across the three channels is measured against the eighteen hour clock the percentage of local content moves from 23.6% to 30.5%.

	Total Hours	Minus 12.00-6am	Sum	18 hour clock	%
TV One	3587	4	3583	6570	54.5%
TV2	1305	160	1145	6570	17.4%
TV3	1298	10	1288	6570	19.6%

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First-run Hours

First-run hours include both peak and off peak programming. First-run hours are an important local content indicator because their levels directly reflect the amount of new investment (positive or negative) in local programming. As Figure 2 below demonstrates, total first-run hours decreased by 31 hours from 5182 hours in 2000 to 5151 in 2001.

- Entertainment hours gained ground again after a drop in 2000, increasing by 78 hours
- First-run Children’s hours remained static due to a decline on TV3 which offset an increase on TV2
- Hours of Drama/Comedy increased by 13% due to a renewed commitment to these genres by TVOne and TV3
- Documentary hours increased by 17%
- Maori programmes continued to increase due mainly to the inclusion of one full year of TV3’s *Pukana*

Fig 2 First Run Hours (Peak And Offpeak) For All Three Channels

	News, CA	Entertainment	Sport	Doco.	Information	Drama/Comedy	Children	Maori	Total
2001	1992	391	766	197	990	205	308	295	5151
2000	1876	313	1188	168	892	181	308	256	5182
1999	1835	418	932	229	743	179	297	196	4830
1998	1745	313	945	233	729	182	342	180	4673
1997	1438	230	864	189	772	171	367	180	4211
1996	1186	154	1055	187	717	201	403	165	4068
1995	1032	270	1545	206	320	224	467	127	4191

As a percentage of their total broadcast hours (calculated as 8760):

- TV One screened 35% first-run local content (37% in 2000)
- TV2 screened 11% first-run local content (9% in 2000)
- TV3 screened 13% first-run local content (9% in 2000)

If, once again, we do the eighteen hour calculation for first-run local content, then

- TV One screened 46.7% first-run local content (49% in 2000)
- TV2 screened 13.3% (12% in 2000)
- TV3 screened 17.4% (17% in 2000)

The Australian transmission quota does not distinguish between repeats and first-run. A comparison of these figures is therefore beyond the scope of this report.

Genre hours per channel are set out in Figure 3 below.

TV One

- screened first-run hours that accounted for 86% of TV One's total local content (down 5% from 2000)
- experienced a drop in first-run local content hours for the first time since 1995
- screened almost three times the first-run documentary hours of TV2 and almost four times those of TV3

TV2

- screened first-run hours that accounted for 72% of TV2's total local content hours (up 3% on 2000)
- increased first-run output in Children's, Entertainment, Information, Documentaries and Sports
- dropped its first-run Drama/Comedy output by 10 hours but still stayed well ahead of the other two channels in these genres
- remained in third place in terms of first run local content (mainly due to the channel's low news output)

TV3

- screened first-run hours that accounted for 88% of TV3's total local content hours (up 11% on 2000)
- increased first run hours in News, Information, Drama/Comedy and continued to increase Maori programming
- significantly lowered sports coverage

Fig
3

First Run Hours (Peak And Offpeak) By Channel

TV ONE	News, CA	Entertainment	Sport	Doco.	Information	Drama/Comedy	Children	Maori	Total
2001	1142	70	423	103	832	21	0	182	3071
2000	1347	77	759	91	793	5	0	163	3235
1999	1324	74	758	121	670	25	0	144	3116
1998	1328	65	751	132	676	14	0	140	3106
1997	1002	60	562	108	438	24	8	146	2349
1996	757	46	748	121	249	20	1	122	2064
1995	526	131	1066	128	229	41	28	127	2276
TV2									
2001	8	291	21	56	61	157	294	47	934
2000	11	205	20	37	43	167	271	47	801
1999	4	290	71	48	30	145	255	48	889
1998	0	182	36	28	25	144	210	40	665
1997	18	125	121	20	281	119	198	34	916
1996	0	75	102	9	378	136	209	44	953
1995	89	77	197	18	7	135	243	0	588
TV 3									
2001	542	30	322	38	98	28	14	67	1145
2000	518	31	409	40	57	10	37	47	1149
1999	507	55	103	61	43	10	43	3	825
1998	421	67	158	73	28	23	132	0	902
1997	418	45	181	60	52	28	162	0	946
1996	429	33	205	57	89	44	193	0	1050
1995	417	62	282	61	85	49	197	0	1153

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Repeat Hours

Repeated programmes are not usually a feature of prime time (although levels are higher over the summer holidays). Repeat programmes are screened by channels partly as a result of the demands of 24-hour transmission (ie. the need to screen cheap programmes in uncommercial slots such as very early morning) and partly due to efficient utilisation of local product by the channels (ie. repeat screenings are mostly utilised at no cost).

Some programmes, such as preschool children's programmes, are designed to be repeated and have a long shelf life so that they may serve different emerging audiences.

The total for hours of repeats in 2001 was 1039, up 35 from 1004 in 2000.

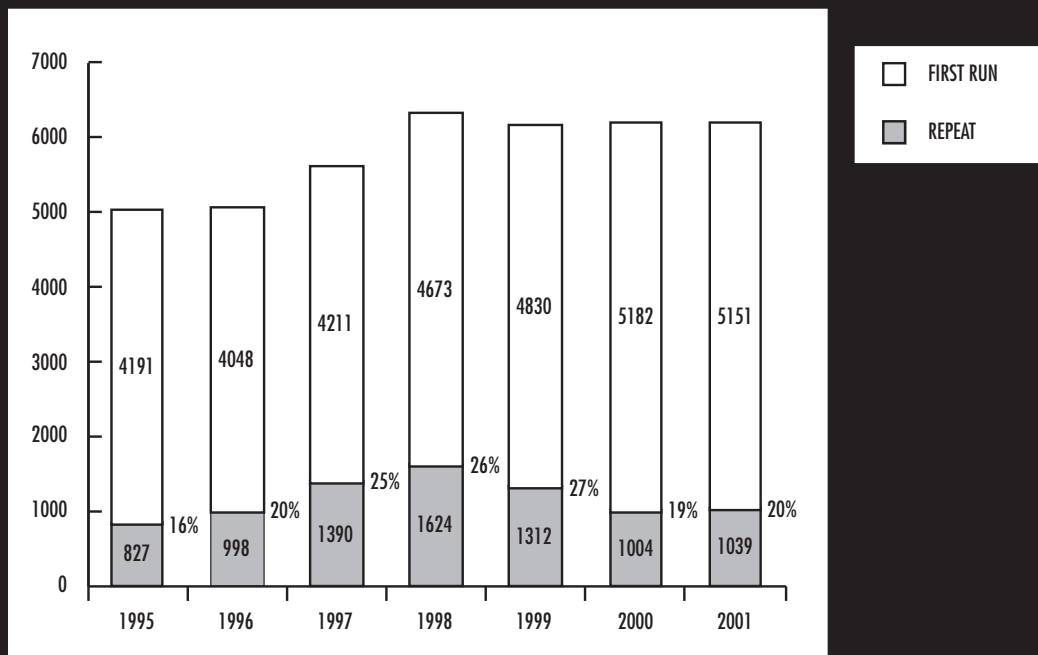
Major fluctuations in levels of repeat programmes tend to be related to the scheduling of high volume infomercial-oriented programmes. In 2001 the increase in repeat hours was primarily due to repeats of *Good Morning, Jude's House and Five O'Clock With Jude Dobson*, on TVOne as well as many other shorter-run information shows. News repeats also added to the total repeat hours on TVOne.

This increase in repeats was almost compensated for by decreases in repeats in almost all genres on TV3.

These changes have meant that for 2001, repeat programmes (as a proportion of first run hours) rose only slightly to 20% (from 19% in 2000, the lowest result since 1995). Even so, the 2001 figure remains a notable decrease on 1999's high of 27%.

Fig 4

First run hours vs. Repeat hours



Prime Time Hours

Prime time figures are a useful guide to whether production spending by the television networks is holding its own. As prime time attracts the biggest audience, and consequently has the biggest revenue potential, it is logical that most network production dollars will be spent on programming in this time band.

In 2001 total prime time hours increased slightly. Total prime time hours were 1629 in 2001, making up 37.2% of prime time local content, compared with 1608 (36.5%) for 2000. This increase occurred despite a marked decline in prime time Sports programming on TV3 and TVOne. Sports coverage on TV3 dropped from 87 hours in 2000 to 30 hours in 2001. On TVOne prime time Sports coverage dropped from 42 hours in 2000 to 17 in 2001. This decline was compensated for by increases in information, documentaries and drama/comedy and news.

It is worth noting that the highest level of prime time local content, since this survey has operated, was recorded in 1994 – 1820 hours or 41.7%.

As a percentage of their prime time schedules (calculated as 1460 hours per channel):

- TV One screened 54% local content (54% in 2000)
- TV2 screened 20% local content (19% in 2000)
- TV3 screened 37% local content (32% in 2000)

Excluding News and Current Affairs hours, the prime time first-run figures change to:

- TV One: 17% (17% in 2000)
- TV2: 20% (18% in 2000)
- TV3: 10% (7% in 2000)

TV One

- once again screened the most prime time local content of all channels, 795 hours, a slight decrease on 2000's 803 hours

TV2

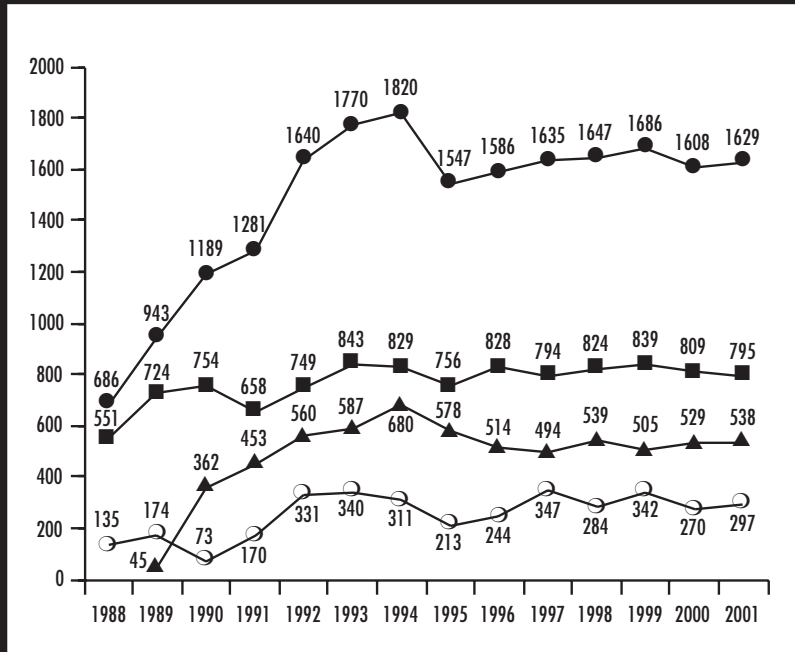
- gained ground with an increase of 27 hours, mostly due to an increase in prime time information and documentary programming
- slightly decreased its commitment to prime time Drama/Comedy by 10 hours

TV3

- increased its prime time local content by 8 hours
- continued to screen very few commissioned drama or comedy programmes
- markedly decreased prime time sports coverage by 57 hours
- increased news and current affairs hours by 37 hours

Fig
5

Prime time hours by channel



8

Trends by Genre

A brief comment on the 2001 trends by genre follows. Statistics for each of the nine genres by channel are summarised in Appendix 2. Appendix 3 provides a complete table of hours by genre since 1988.

Drama/Comedy

Total hours of drama/comedy decreased by 23 hours in 2001. But, first-run hours in this genre increased by 24 hours mainly due to improved results on TVOne and TV3.

TV2 remains well ahead of both TV One and TV3 with *Shortland Street* continuing to dominate the TV2 drama output, with daily first-run and repeat screenings. A second 13 part series of *Street Legal* screened and 2001 also saw the return of *Lawless* in one more telefeature.

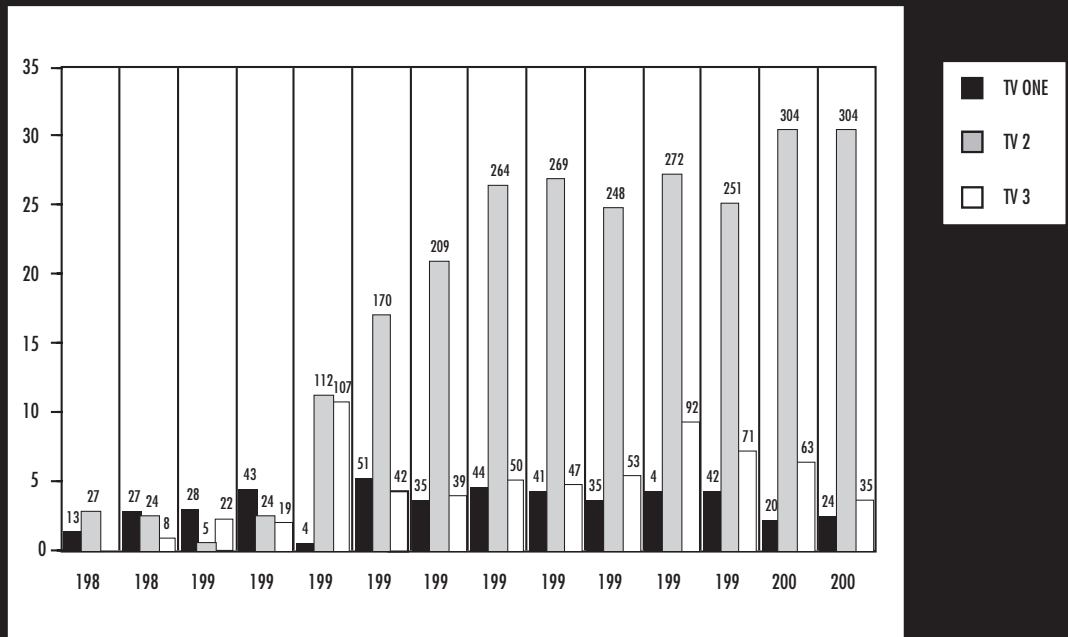
TV One's total hours in this genre improved slightly by 4 hours. However first-run hours improved by 16 hours in 2001 with the first series of *Mercy Peak* screening along with new comedy series *Spin Doctors* and *Willy Nilly*. A second series of *The Life and Times of Te Tutu* also screened.

TV3's total drama/comedy hours decreased significantly from 63 to 35 hours. However, the channel's commitment to the genre in prime time increased from 10 hours to 27. New shows *The Panel* and *The Great Comedy Debates* were responsible for this, together with three one-off dramas, *The Possum Hunter*, *Fishskin Suit* and *Love Mussel*. TV3 repeats in this genre dropped by 46 hours to 7 hours, contributing significantly to the overall decline. *Being Eve*, the first new children's drama to screen since *Mirror Mirror* in 1996, also debuted on TV3 in 2001.

This category receives substantial support from NZ On Air. Drama and Comedy programmes, including Children's Drama, receive around one third of the total NZ On Air television budget.

Fig 6

Total NZ drama hours by channel



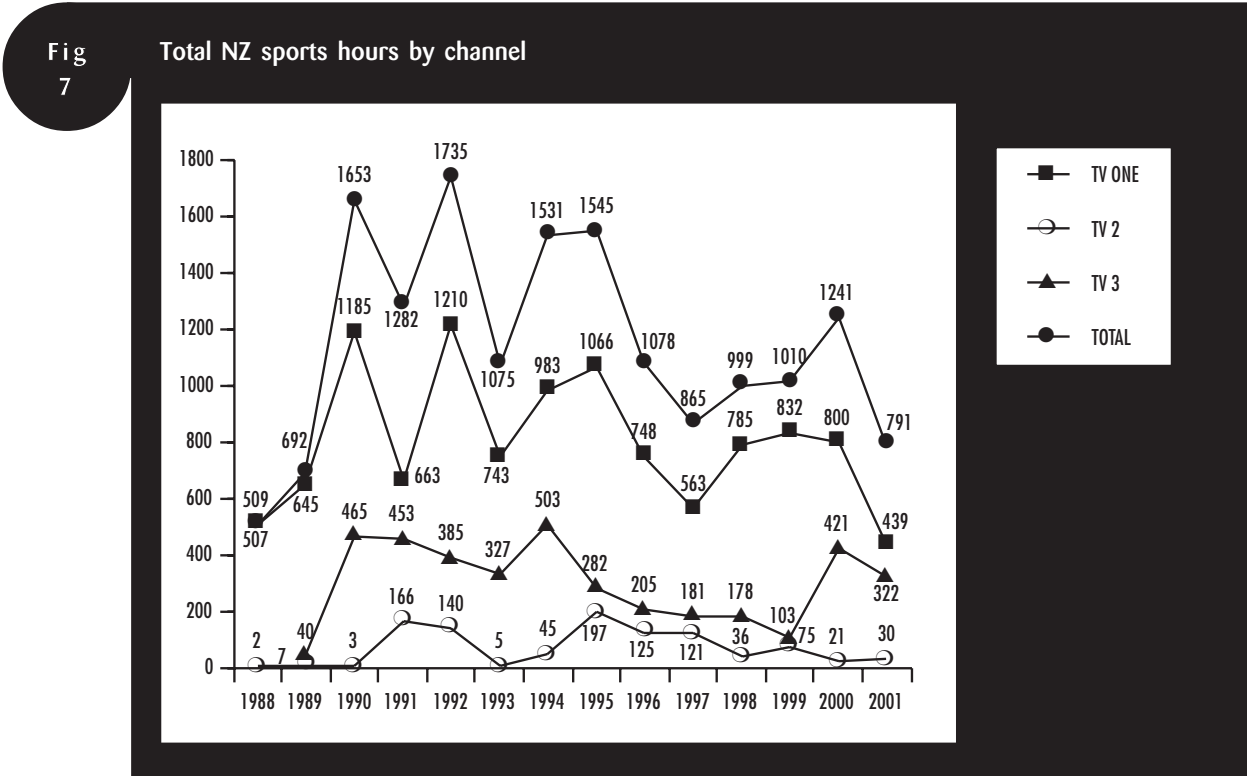
Sport

Total sports coverage can fluctuate dramatically, largely affected by major international events such as the Olympic Games (1992, 1996 and 2000), Commonwealth Games (1990, 1994 and 1998) and The America's Cup. In 2001, without any of these major events, total hours dropped dramatically by 450 to 791 hours. As these programmes all screened on TV One its content also dropped dramatically.

TV2's hours increased by almost a third with the addition of *Swell TV*.

TV3's sports hours dropped by 99. This was due to the channel concentrating on the major sporting codes such as rugby, rugby league and cricket and screening less of other codes such as golf and tennis.

Sports programmes are generally not funded by NZ On Air.



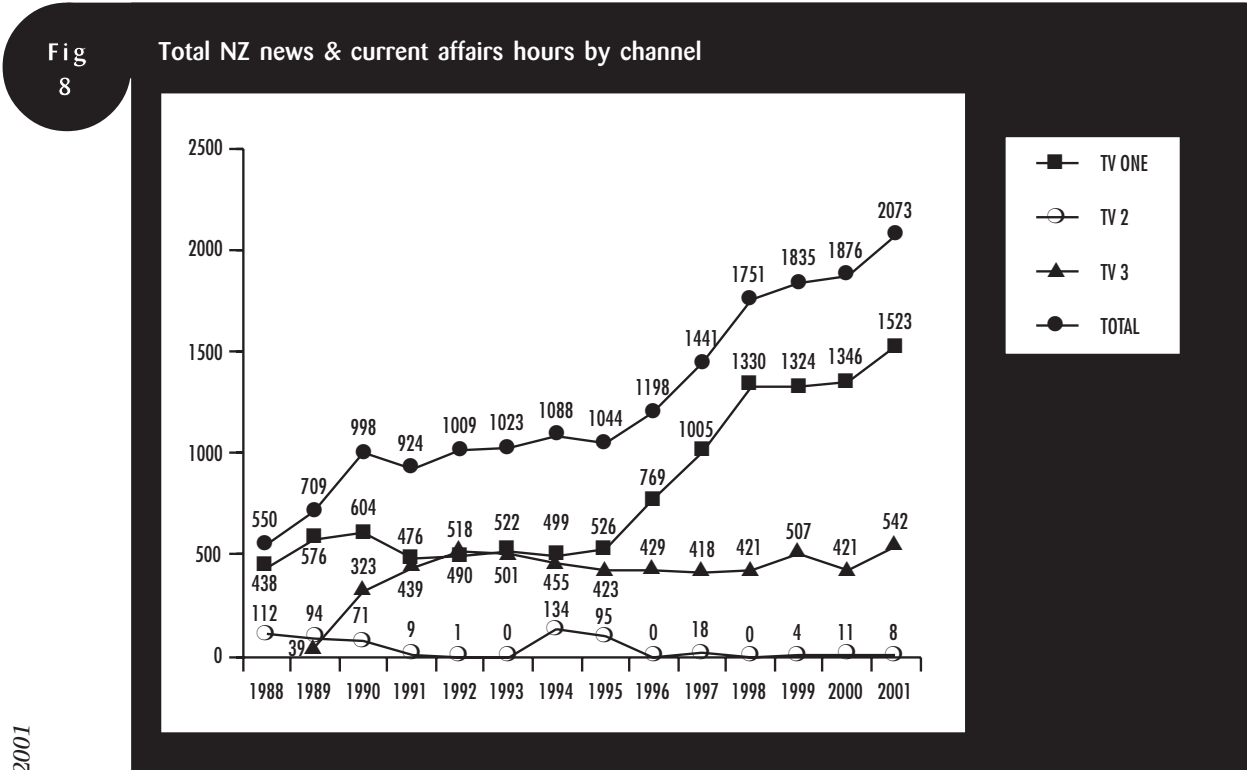
News And Current Affairs

There was a 197 hour increase in the total number of News and Current Affairs hours. This was largely due to an increase in repeats of News and Current Affairs programmes on TVOne, such as *Assignment* and *Brunch*; a repackaging of *Breakfast*. Total news hours on TVOne and TV3 were also inflated by coverage of the events of September 11.

TVOne continued with its early morning *Breakfast* and *Business News*, which were first introduced in August 1997. The channel's staples continued to be the daily *One News* which runs for a full hour, including weekends, and the weekday *Holmes, Tonight* and *Midday*. *Assignment*, *60 Minutes* and *Face the Nation* returned.

TV3 continued with the daily *3 News* and *Nightline*. The channel also continued with its brief hourly *3 News Update*, which has been allocated at 2'30" per day (this production is not recorded in the *Listener*).

TV2 continued its hourly *Newsbreaks*, screening two of one minute per day and one of 30 seconds. This category is not funded by NZ On Air.



Entertainment

Total entertainment programming increased by 23% in 2001; from 433 to 533 hours.

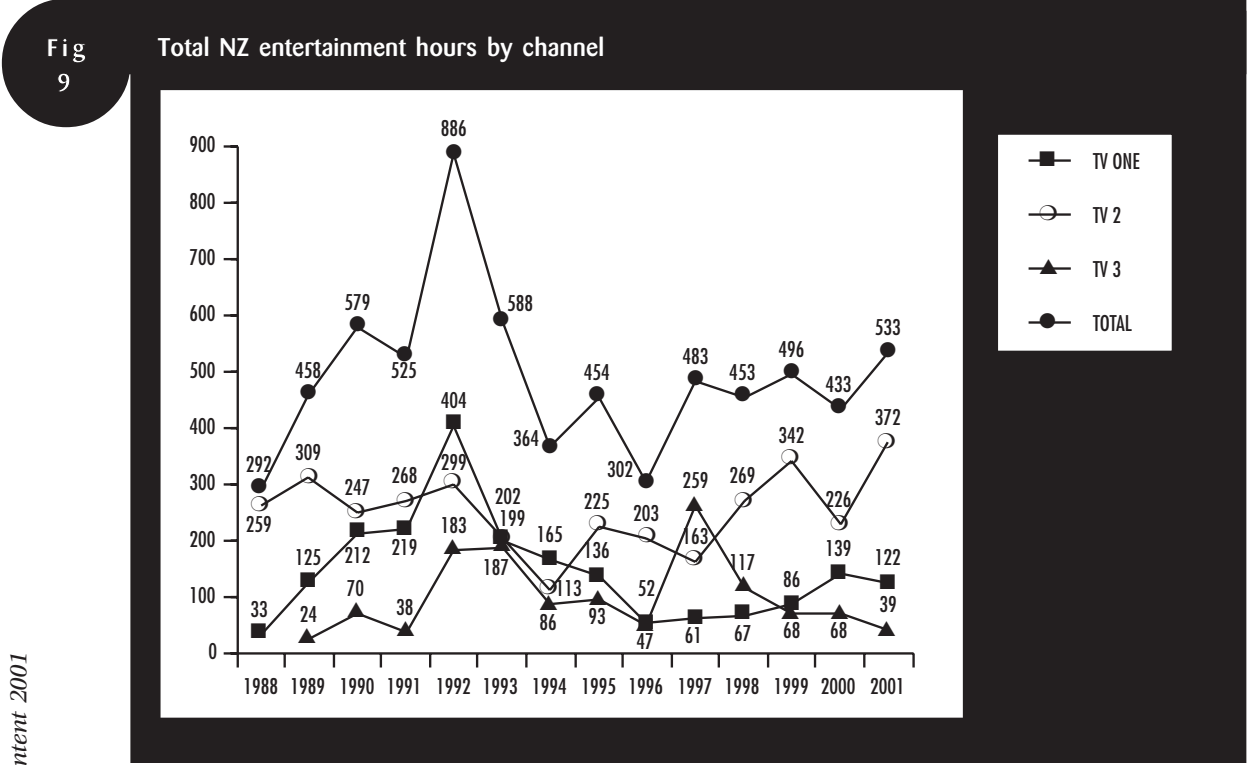
First-run hours in this genre were boosted by a large increase in the number of offpeak hours on on TV2. In 2001, TV2 screened 85 more hours of off peak entertainment programmes than in 2000.

With 371 hours TV2 screened almost 3 times the number of hours of TV One and almost 6 times the total hours of TV3. TV2 dominance in this genre in terms of total hours is mainly due to the arrival of M2, a music show playing from midnight to 6.00am on Thursdays, Fridays and Saturdays. Returning series on TV2 included *Mitre 10 Dream Home*, *Squeeze*, *Coca Cola Chart Show*, *Havoc: Luxury Suites and Conference Facilities*, *Weddings* and *Treasure Island*. New series included *Second Honeymoon*, *You Gotta Have It*, *Life on Tape*, *Shred*, *The Big Time* and *Celebrity Treasure Island*.

TV One's total hours remained relatively static with the only notable change being a drop in repeat hours from 62 to 52 hours. *Changing Rooms* and *Taste New Zealand* returned with new series. Several new shows also debuted in this genre: *Adventure Central*, *Mucking In*, *Risk*, *Living Without* and *The Weakest Link*.

Total entertainment hours for TV3 dropped by 29 hours to reach 39 hours, the lowest total since 1997. This decline was due to a 29 hour decrease in repeats to 9 hours in 2001.

Entertainment programmes are generally not funded by NZ On Air as they do not tend to require a subsidy to be made. Exceptions have included some performance-based series and youth series such as *Polyfest 2001*, *Space* and the *Billy T Awards*.



Children's

2001 saw a continuation of the decline in this genre since the high of 1265 hours, recorded in 1992. This year a total of 488 hours of local Children's programming screened compared with 591 for 2000. This decline is due almost entirely to a decrease in repeats on both TV2 and TV3.

Again TV2 was by far the main provider of Children's programming, with a total of 358 hours, a decrease of 46. First-run local hours on TV2 increased however by 23 hours from 2000 to 294 hours in 2001. This on top of an increase of 15 hours between 1999 and 2000.

Repeats on TV2 dropped markedly, accounting for only 18% of the channel's total local content for children, compared with 33% for the year before. This decline in repeats therefore was the main contributor to TV2's decline in total hours. It should be remembered that repeats are valid programming for younger children as small children learn through constant repetition and most children's shows are designed to have a long shelf-life so that they may serve the different emerging audiences.

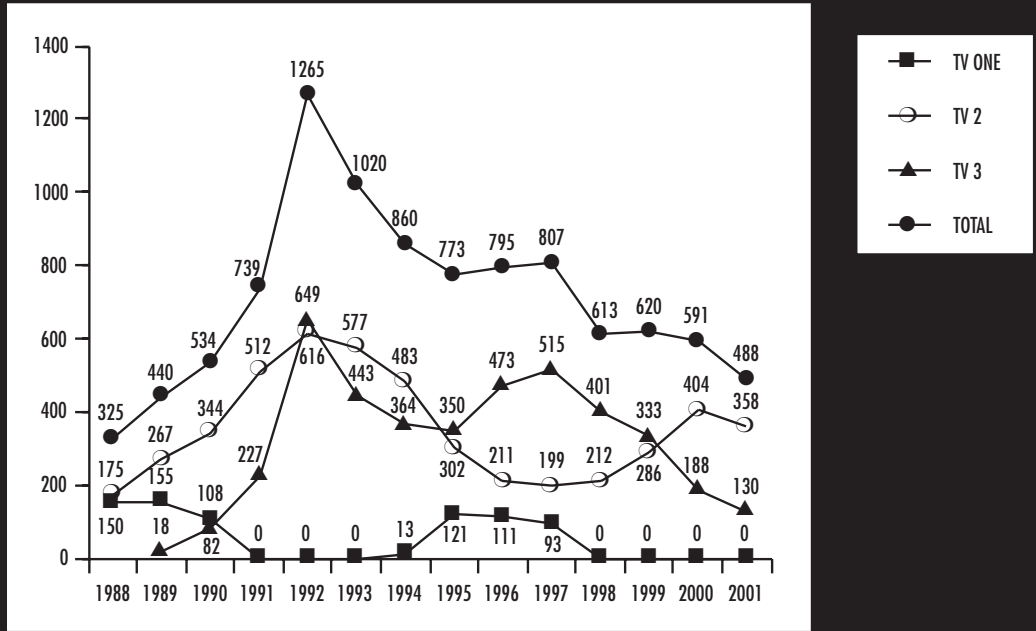
Total hours on TV3 decreased by 58 hours to 130. This decrease represents the lowest level of children's programming on TV3 since 1990. This was due to a significant drop in repeats and the discontinuation of *Ice TV*. As mentioned under Drama/Comedy, first run Children's Drama returned with TV3's *Being Eve*.

The only programme on TV One that could be called a Children's programme, *Tiki Tiki*, is counted as a Maori programme in this survey due to its Maori language content.

NZ On Air is the main contributor to Children's and Young Persons' programming. The only locally made programme in this genre to screen that did not have NZ On Air funding, was the repeat screening of *Buzz and Poppy*. NZ On Air provided just under \$10 million of funding for production of around 325 of first-run hours in the 2000/2001 funding year. Broadcasters will not commission this genre without substantial financial assistance.

Fig 10

Total NZ children's hours by channel



Maori Programmes

The rise in programming made predominantly by Maori for Maori (whether in Te Reo or English) continued, with total hours increasing from 371 hours in 2000 to 396 in 2001.

The three main ongoing programmes on TV One (which continues to have by far the most Maori programming) were *Marae*, *Waka Huia* and *Te Karere*. Boosting the hours were repeat screenings of the pre-school Maori programme *Tiki Tiki*, and another summer season of *Marae*. TV One's total hours in this genre remained static at 242. However the percentage of this content that was repeat, decreased from 32% in 2000 to 25% in 2001. First-run hours on TV One increased to 182 hours from 163 in 2000. The overall rise in Maori programming on this channel was due largely to the summer season of programmes funded by Te Mangai Paho during the down-time of *Marae* and *Waka Huia*.

Total hours for TV2 increased by 3 to 87 hours. First-run hours remained static at 47, with a slight increase in repeats. Youth series *Mai Time* continued and *Maraerobics* also screened.

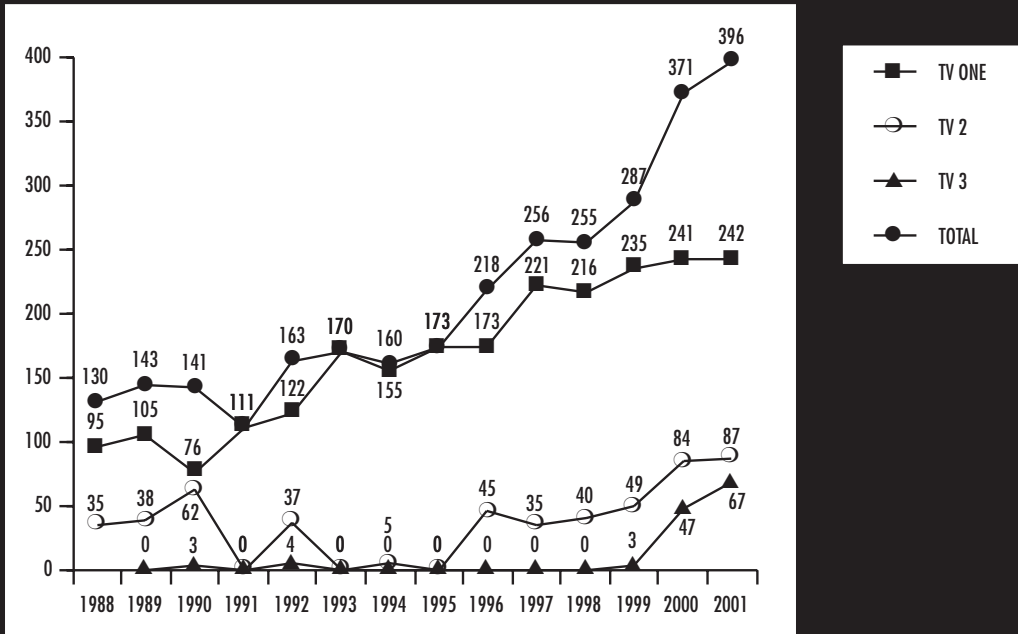
TV3's new shows, *Kapa Haka* and *Manu Tioriori* contributed to the increase in Maori programmes. TV3's total hours increased from 47 in 2000 to 67 in 2001. Again, TV3 screened no repeats in this genre.

The majority of Maori programming is funded by Te Mangai Paho. *Mai Time* is funded by NZ On Air. All listed programmes screened offpeak. Other Maori programmes of interest to a general audience, which includes Maori, were *The Maori Sports Awards* and *Ahurea: Haka Time*.

In addition to programmes included in this category, some documentaries with significant Maori content screen in TV3's *Inside New Zealand* and TV One's *Documentary New Zealand*.

Fig 11

Total Maori programmes by channel



Documentaries

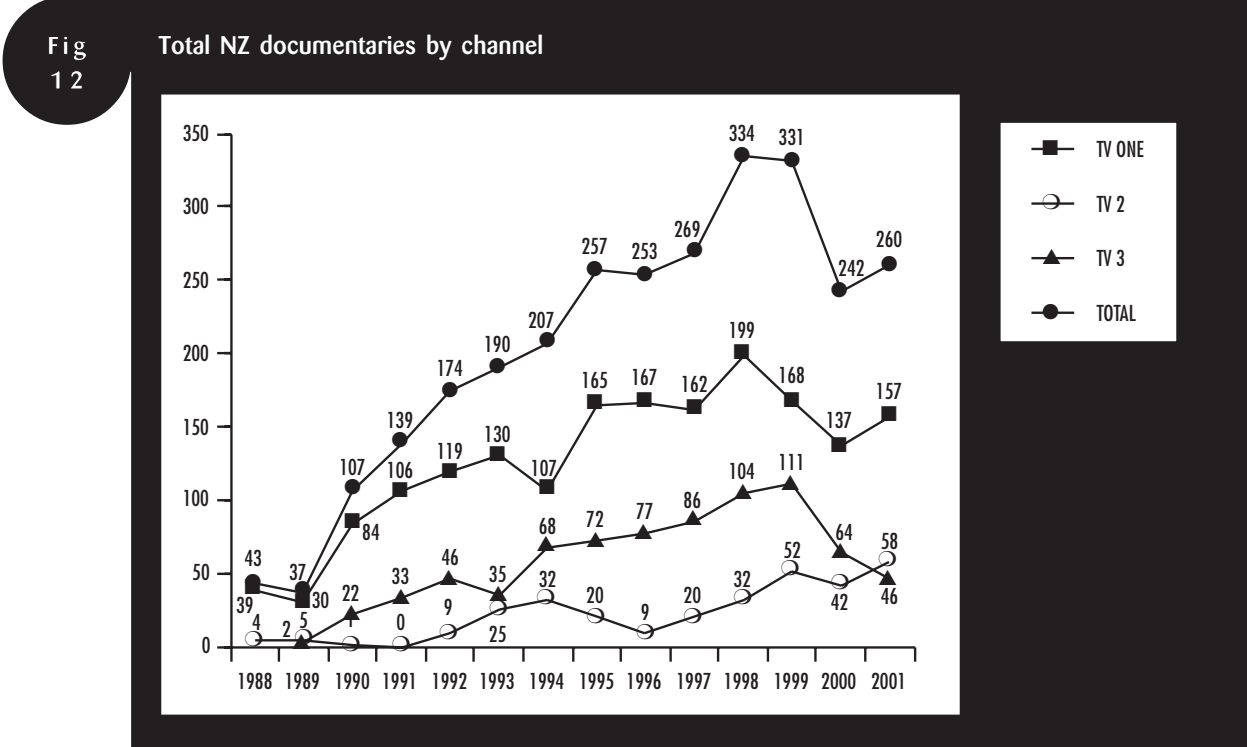
Total documentary hours increased by 18 hours, from 242 in 2000 to 260 in 2001.

TV One screened more documentaries than the other two channels and increased its total documentary hours by 20. New series on TV One in 2001 included *New Zealand Sex, From Here to Maternity, Pioneer House* and *The Captain's Log*. Returning series included *Location, Location, Location* on the real estate business, reality series *The Zoo, Epitaph II* and *Country Calendar*. *Documentary New Zealand* entered its fourth year.

TV2 screened an all-time high of documentary hours in 2001: 58 hours, up from 42 in 2000. Most of these were first run hours. TV2 introduced *Get a Life, Adventures in Wonderland* and *Quest for Success* as well as some one-off specials such as *High Country Dance, New Zealand's Richest* and *Do you Believe in the Paranormal?*

With a total of 46 hours of local documentary, this is the lowest figure for TV3 since 1993. *Inside New Zealand* returned for its tenth year and *Wild About New Zealand* and *Ghosts* were introduced. Repeats on TV3 dropped by 15 hours to 9 hours, which was the main reason for the decline in the total hours of documentary on TV3.

NZ On Air is a substantial supporter of the documentary genre, providing around \$8 million funding per annum.



Information

This genre experienced an increase in total hours of 232 to achieve 1272 hours in 2001.

This increase was mostly due to a big increase in repeats on TVOne. In particular, the move of the *Good Morning* repeat to TVOne from TV2 contributed to this increase, together with repeats of *Five O'Clock With Jude Dobson* and *Jude's House*.

Overall repeats in this genre were up, with 22% of the total information hours being repeats compared with 14% for 2000 and 38% in 1999.

Although TV One's overall information programming increased significantly, the channel's prime time hours decreased by 7 hours to 87. New series included *Troubleshooters*, *The Big Art Trip* and *Mercury Lane*. Returning prime time information series included *Home Front*, *Taste New Zealand*, *Going Going Gone*, *Jim's Car Show*, *Maggie's Garden Show*, and *Fair Go*. Offpeak returning series included *Asia Down Under*, the Christian series *Praise Be*, and *Inside Out* for people with disabilities. The daily semi-infomercial series *Good Morning* was once again the main contributor to TV One's off peak first-run hours.

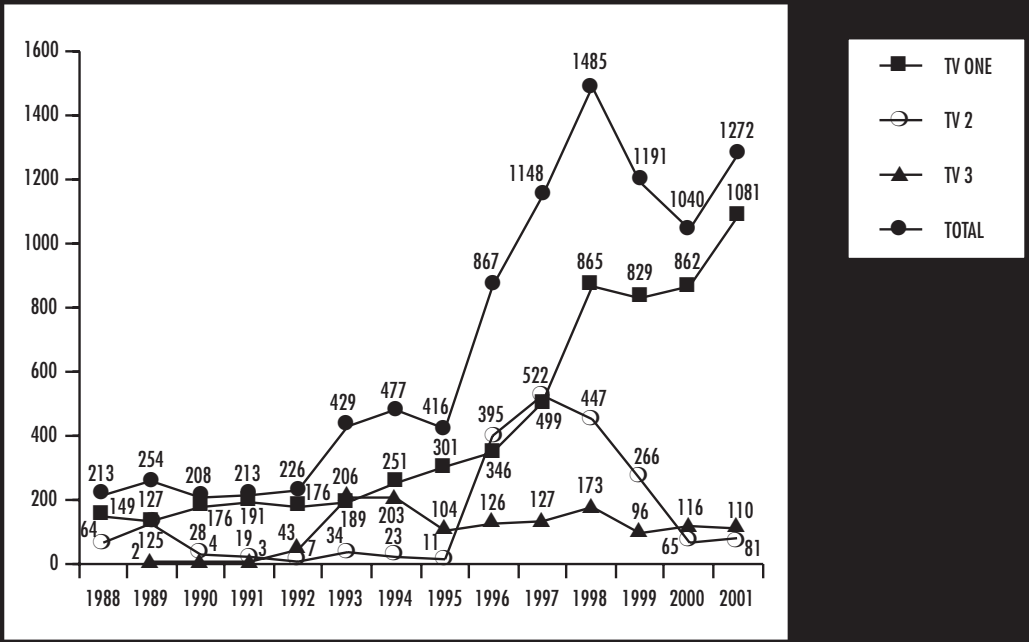
TV2's information programming increased slightly, but prime time information hours on this channel increased by 18 to 41 hours. New TV2 titles in this genre were *It's Your Money* and *The Money Game*. Returning series were *My House My Castle* and *Love that Car*, with *Queer Nation* screening off peak.

Total hours in this genre decreased by 6 on TV3. Consumer issues series *Target* continued, along with *Gone Fishing*, *Mazda Outdoors*, *Hot Property* and the rural show *No. 8 Wired*. TV3's prime time hours in this genre were up 13 hours to 38 in 2001. Repeats were down by 47 hours. A full season of *No.8 Wired* contributed to an increase in off peak hours by 28 to 60.

NZ On Air funds some programmes in this category, mostly Special Interest programming for TVOne, such as *Asia Down Under*, *Inside Out* and *Tagata Pasifika*.

Fig 13

Total NZ information programmes by channel



9

Non-National Channels

This survey includes data on a sample of non-national and pay TV channels. The two biggest free-to-air channels, TV4 and Prime TV, are included. So, too, are the main services of Sky, the biggest pay operator. Now that Sky has a digital service, monitoring all of its channels is impracticable, especially given that most of its channels have no local content. Therefore four channels are monitored, all of which are likely to carry local content at some stage.

Figures are attached as Appendices 7, 8 and 9.

Free To Air

TV4's percentage of local content increased to 5.6% from 5.3 % in 2000 and 3.5% in 1999. Its prime time first-run programmes increased from 52 hours to 79 hours, exceeding 1998's high of 63 hours, due mainly to a full year's run of *Most Wanted*. Other first-run series included *Xsport*, *The Vodafone Surf Show*, and short film festival, *Shortcuts*. The number of repeat hours halved, which is why the overall local content percentage remained relatively static despite the increase in first-run hours.

Prime is considered as one channel, despite its technical structure of five regional channels, because the majority of its output is networked. Its local content increased from 653 hours or 14% in 2000 to 697 hours or 15.9%. This local programming largely consisted of the predominantly infomercial series *Prime Living* and *Prime Sport Specials*. *Prime Living* was also repeated, meaning 40% of the channel's local output comprised repeats.

Two of Prime's five channels also screened *Local News*. In order that the figures are not unduly skewed, simultaneous programme breakouts of different programmes to different regions, like the *News* breakouts, are only counted as one programme.

TV4 Hours

	Prime	Offpeak	Repeat	Total
2001	79	56	51	186
2000	52	12	102	166
1999	36	35	48	119
1998	63	9	78	150
1997	43	109	36	188

Prime TV Hours

	Prime	Offpeak	Repeat	Total
	21	388	288	697
	15	393	245	653
	68	418	501	987
	44	190	148	382
	0	0	0	0

Sky Television

Figures for four Sky channels have been collated. Local content hours predominantly comprise News and Sport.

- Sport (Sky Sport) screened just under 1600 hours or 17.9% local content in 2001 (19% in 2000).
- Discovery had virtually no local content apart from one hour of documentary in 2001. Trackside, the TAB racing channel (which shares time with the Discovery channel) has approximately 90% local content and screened 1979 hours of racing in 2001, which pushed this channel's local content percentage to 22.6%.
- CNN decreased its local output slightly from 443 hours in 2000 to 347 hours in 2001. These hours are the repeats of TV3's *3 News*, and the Current Affairs series *Leighton Smith Live*.
- HBO Movies screens the occasional New Zealand feature film and documentary.
- Other Sky channels have not been measured since the introduction of Sky's digital service because they do not carry significant levels of local content and are not listed in the *Listener*.

NZ On Air helped fund a small number of TV4 programmes which were subsequently repeated on TV3, and the *New Zealand Wearable Art Awards* on Prime. No NZ On Air funding is currently directly allocated to Pay-TV channels.

Regional Channels

Since this survey began there has been a burgeoning of smaller regional and community channels. At least 17 such channels now operate, from the far North to Invercargill, claiming a potential audience of 2,664,500.

The New Zealand Regional Television Broadcasting Group (RTB) represents the common interests of these stations. These stations may operate under commercial or non-commercial licences but the RTB maintains that the key point which they have in common is that they are able to meet the viewing demands of that part of the population whose viewing requirements cannot be met on a national basis.

The RTB submits that its members screened 20569 hours of locally-made or locally-provided programmes, 14563 hours of which are repeats. Of the first-run content the distinction between locally-provided and locally-made, is important. A locally-provided programme is one purchased from overseas by a local community group, with broadcast time then purchased from the local channel. A locally-made programme is just as it sounds.

The Chairman of the RTB says that of the 6006 first-run hours claimed, two thirds would be locally-made and one third locally-provided. Obtaining an accurate breakdown of these hours for direct comparison with the other figures, is beyond the scope of this report. Much of the programming reported as first-run has also already screened on another regional channel.

Notes:

- Recording local content on smaller and pay channels is more difficult, due to less information being included in *Listener* billings. Therefore data, particularly for Sky's Sports channel, should be taken as a guide only.
- Regional break-out programmes, such as the local news and *Prime Living* programmes on Prime, have been counted as only one programme even though the five regions may have different programmes screening simultaneously. This is to avoid distortion.
- Filler programmes such as New Zealand music videos are not included, just as filler programmes are not included for the national channels.

Notes On Methodology

1. Data from the *Listener* programme billings is recorded onto an Access database. Scheduling changes by the television networks after *Listener* publication are generally not included; nor are unlisted programmes such as short filler programmes included. The main exception is the “newsbreak” formats adopted by TV3 and TV2, where a general allocation has been made.
2. Programmes have, in most cases, been counted according to the amount of New Zealand content within the programme. For example, series such as *20/20* which averages two overseas stories and one New Zealand-produced story per episode, have been recorded as containing one-third of an hour New Zealand content (two thirds in the case of *60 Minutes*). There is a degree of arbitrariness to such allocations, but the emphasis is on consistency so trends can be observed.
3. The major exception to that definition is programmes which fluctuate significantly, and whose New Zealand content is not always published in detail in advance. Sports programmes are the chief exception. The only accurate way of measuring New Zealand content is by timing each week’s programmes as they go to air, which is not a practicable exercise for NZ On Air. Therefore, all sports content included within New Zealand-produced branded programmes such as *One World Of Sport*, has been counted as a New Zealand programme. For sports matches not featuring a New Zealand team, but which include a New Zealand commentator “topping and tailing” the broadcast, an allowance is made for the presenter links only.
4. If a programme straddles prime time and off-peak, it is counted as prime time if the majority of the programme screens in prime time. For example, if a programme begins screening at 9.15pm and concludes at 10.15pm, it is counted as one hour of prime time.
5. In general, programmes are counted as whole hours or half hours irrespective of the differing durations often encountered. For example, a programme may actually have a duration of 22 minutes or 24 minutes or 29 minutes, depending on advertising and promotion break durations, but is counted as a full half-hour for simplicity.
6. “First-run” programmes mean programmes which are appearing on a free-to-air national network for the first time. If a programme screened on TV4 or Prime first, and was then repeated on TV3 or TVNZ, the latter screenings are counted as a repeat. Previous screenings on pay television are not counted.
7. New Zealand content is classified as material which is both predominantly made in New Zealand and which reflects New Zealand identity and culture. Thus programmes which are made in New Zealand but which have no New Zealand flavour are not counted (such as the drama series *Xena*). Neither are programmes about New Zealand but made for foreign television channels.
8. Programme hours are divided into nine categories. Within each category, and by channel, programmes are described as:
 - prime time (first-run programming screening between 6pm – 10pm)
 - offpeak (first-run programming screening any time outside prime time)
 - repeat (repeated programming screening both in prime time and offpeak).

9. The categories are:

Drama/Comedy

This category contains all New Zealand-made drama and comedy, other than drama made for children. Comedy is classified as drama, not entertainment, when it is scripted and acted in accordance with usual drama production techniques (such as *Pio!* and *The Topp Twins*).

Sports

This category includes all programmes packaged and produced in New Zealand. This the only category which can contain a high level of overseas content and still be classified as a New Zealand programme. See paragraph 3 above.

News and Current Affairs

This comprises all New Zealand-produced news and current affairs programmes. One-off advertised events are included, but special bulletins which have not been advertised are excluded. For programmes which are a mixture of New Zealand and overseas material, such as *Assignment*, only the New Zealand portion is counted.

Entertainment

This category includes game shows, music programmes (from classical to rock), quizzes and competitions such as *Tux Wonder Dogs*, broad competitive formats such as *Changing Rooms*, *Mitre 10 Dream Home* and *Ground Force* plus light entertainment such as *McDonalds Young Entertainers*.

Children's

Programmes which use New Zealand presenters to provide links between cartoons and other overseas material, such as TV2's *What Now Weekdays*, or which have a minority of New Zealand content such as *Squirt*, are classified by the amount of New Zealand content only. Programmes which contain some overseas content but have a majority of New Zealand content, such as the Sunday *What Now*, are fully classified as New Zealand programmes.

Children's Drama

When this survey commenced, a larger amount of children's drama was being produced. While this is not the case currently, this category has been retained for consistency.

Maori Programmes

This category comprises programming made specifically for a Maori audience, such as *Marae*, *Waka Huia* and *Te Karere*.

Documentaries

This category generally comprises one-off documentaries or series in a non-magazine format.

Information

This category comprises a wide range of programme types, generally with a magazine format and/or an information as opposed to an entertainment or competitive flavour. Examples include series such as *Maggie's Garden Show*; religious series such as *Praise Be*; arts and culture programmes such as *Backch@t*; leisure and lifestyle series such as *Real Food For Real People*; and special interest series such as *Inside Out*.

For All Programmes Screened

Year 2001

Category:	TV One				TV2				TV3			
	Prime	Repeat	Offpeak	Total	Prime	Repeat	Offpeak	Total	Prime	Repeat	Offpeak	Total
Information	87.25	249.33	744.67	1,081.25	41.00	20.00	20.00	81.00	37.50	12.50	60.00	110.00
Documentaries	87.33	53.50	15.75	156.58	54.50	1.50	1.50	57.50	34.50	8.50	3.00	46.00
Maori Programmes		60.50	181.50	242.00		40.00	46.50	86.50			67.25	67.25
Children's Drama						7.50	0.50	8.00	6.50			6.50
Children's						63.17	294.42	357.58		116.08	13.83	129.92
Entertainment	45.00	51.67	25.00	121.67	47.02	81.08	243.75	371.85	12.50	8.50	17.75	38.75
News/Current Affairs	543.25	81.00	898.42	1,522.67	8.12			8.12	389.87		152.50	542.37
Sports	17.08	15.92	405.67	438.67	0.50	9.50	20.00	30.00	30.00		292.25	322.25
Drama/Comedy	15.00	3.50	5.50	24.00	145.50	147.92	11.00	304.42	27.00	7.00	1.00	35.00
Totals	794.92	515.42	2,276.50		296.63	370.67	637.67		537.87	152.58	607.58	
Total New Zealand Broadcast Time:	3,586.83				1,304.97				1,298.03			
Total Broadcast Time:	8,760.00				8,760.00				8,760.00			
N.Z. Content Percentage of Total Broadcast Time:	9.1%	5.9%	26.0%	40.9%	3.4%	4.2%	7.3%	14.9%	6.1%	1.7%	6.9%	14.8%
All Three Channels												
Total New Zealand Prime Time:	1,629.42	Total Prime Time:		4,380.00	N.Z. Content Percentage of Total Prime Time:		37.2%					
Total New Zealand Repeat Time:	1,038.67	Total Repeat Time:		26,280.00	N.Z. Content Percentage of Total Repeat Time:		4.0%					
Total New Zealand Offpeak Time:	3,521.75	Total Offpeak Time:		21,900.00	N.Z. Content Percentage of Total Offpeak Time:		16.1%					
Total New Zealand Broadcast Time:	6,189.83	Total Broadcast Time:		26,280.00	New Zealand Content Percentage:		23.6%					

Total NZ Hours By Genre 1988 - 2000

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Drama/Comedy	39	59	55	86	223	264	283	357	357	336	406	364	386	363
Sports	509	691	1653	1283	1735	1075	1531	1545	1077	865	999	1010	1239	791
News/Current Affairs	550	709	997	924	1009	1023	1087	1045	1198	1440	1751	1835	1876	2073
Entertainment	292	458	528	525	886	588	364	454	302	482	453	496	433	532
Children's	325	440	534	739	1264	1019	861	745	783	806	600	620	591	488
Children's drama	12	21	25	20	33	27	2	28	12	0	13	9	6	14.5
Maori	131	144	143	111	163	170	156	173	218	256	255	287	371	396
Documentaries	43	36	107	139	175	190	207	257	252	269	334	331	242	260
Information	213	253	208	213	226	431	477	415	867	1147	1485	1191	1041	1272
Total NZ Content	2112	2804	4249	4039	5715	4788	4969	5018	5066	5601	6296	6143	6185	6190
% of Schedule	23.9%	31.8%	24.2%	31.7%	30.2%	23.2%	23.2%	19.7%	19.2%	21.3%	24%	23.4%	23.5%	23.6%
Total Prime Time	686	943	1189	1281	1640	1769	1821	1546	1586	1636	1647	1686	1602	1629
% of Schedule	23.5%	21.6%	27.2%	29.3%	37.5%	40.5%	41.7%	35.4%	36.3%	37.5%	37.6%	38.5%	36.5%	37.2%

- Notes:
1. These hours are for TV One, TV2 and TV3 only
 2. TV3 commenced in November 1989
 3. Figures have been rounded
 4. Prime time hours for all three channels are calculated as 4392 in total