

NZ On Air | Survey of Regional TV Audiences — Main report

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For | NZ ON AIR

July 2014



Executive Summary (i)



Objectives and method

- NZ On Air commissioned Colmar Brunton to gain an indicative understanding of audiences for regional television channels through research in each region. The main themes of the research are:
 - awareness of the regional channel in each area;
 - levels of channel viewership;
 - what programmes are being watched; and
 - perceptions about the channel in each area.
- Colmar Brunton conducted a telephone survey with 2,001 respondents between 7 April 2014 and 3 May 2014. The sample was structured to allow reporting within each region. We only included those living in regional broadcasting areas (those living in areas where it was difficult/impossible to receive their regional TV signal without an aerial were deliberately **excluded** from the survey through a combination of targeting calls in areas known to have UHF reception and excluding people who said they could not receive a signal without an aerial).

Awareness of local channel

- 4 in 10 (41%) are aware of their local channel without prompting, but this increases to just over 7 in 10 (74%) after prompting.
- Those with a UHF aerial have higher awareness (86% compared with 68% of those who do not have a UHF aerial). (This finding applies across the regions).
- With the exception of Kaitaia and Whangarei, awareness is generally higher among those aged 40-69 (8 in 10 of this age group are aware after prompting).
- Prompted awareness of local channels varies by region. Awareness is highest for Invercargill (at 95%) and lowest for Waikato (42%).

Viewership of local channel

- Around a third (34%) watch their local channel (but most only watch it once a month or less often). The report defines 'viewership' as watching the local channel, even if it is watched infrequently (i.e. less than once a month). Viewership is higher among those with UHF aerials (53%).
- The percentage that watch their local channel varies by region (from 59% in Invercargill to 15% in Whangarei). Those with UHF aerials are more likely to watch (for example 44% of respondents in Dunedin have viewed their regional channel, but this increases to 78% of those with UHF aerials living in Dunedin).
- Viewership is higher among those aged 40-49 and those aged 60-69 (4 in 10 of these age groups are viewers).



Executive Summary (ii)



Viewership continued...

- 7 in 10 viewers watch regional TV for less than an hour (when they do tune in). 3 in 10 watch for around an hour or longer (this is particularly the case for females aged 70 and over and people living alone).

Why viewers watch their regional channel

- Viewers mainly watch local news (59% of viewers), local documentaries (42% of viewers), or local current affairs (29%). Only around 1 in 5 watch international programmes or local sport.
- Viewers were asked why they watch their regional channel. The most common answer was 'because of the local content' (32% of viewers) or because something takes their interest (21%). But it is also relatively common to watch regional TV because nothing else is on (16%) or because they are channel surfing (16%).

Quality of the local channel (among viewers)

- Most viewers perceive the overall quality of their regional channel to be 'good' (50%) or 'very good' (38%). In total 44% say 'excellent' or 'very good' (those aged 70+ are more likely to say this). 6% say it is 'excellent' and 6% say it is 'poor'.
- Most viewers who rated content as 'excellent' say this is either because of the informative nature of the programmes (43% of those saying the channel is excellent) or because the channel presents a local viewpoint (39%).
- Most viewers who say quality is 'poor' say that it is either amateurish (31% of those rating quality as 'poor'), low budget (27%) or that there is better content elsewhere (31%).

Awareness and viewership of local news (among viewers)

- Just over half (54%) of those who watch their local channel are aware of the local news programme (after prompting with its name).
- 30% of regional channel viewers who are aware of their local news programme watch it weekly, 11% watch it 2-3 times a month, 45% watch it once a month or less often. 14% never watch it (despite being aware of the name of their local news programme).

Reasons why people do not watch their regional TV channel (among non-viewers or infrequent viewers)

- Most of those who are aware of the channel but do not watch it (or watch it infrequently) say this is because of a lack of interest in the content (21%), or because they don't watch much TV (19%) – but there are also those who know they cannot receive it (18%).
- People who are unaware of the channel or don't watch it very often say that they would watch it more if there was more promotion (13%) or if there was more interesting content (12%).



Objectives and method

Objectives



- NZ On Air provides funding to regional television broadcasters for news and information programmes specific to their particular region. No consistent research has been undertaken on regional television audiences for some years because of the change to digital broadcasting (digital switch over, or DSO).
- NZ On Air commissioned Colmar Brunton to gain an indicative understanding of audiences for regional television channels through research in each region. The main themes of the research are:
 - awareness of the regional channel in each area;
 - levels of channel viewership;
 - what programmes are being watched; and
 - perceptions about the channel in each area.



Method (i)



- Colmar Brunton conducted a telephone survey between 7 April 2014 and 3 May 2014. Our interviewers use a Computer Assisted Telephone Interviewing (CATI) script which allows appropriate question filtering and routing.
- 2,001 respondents (aged 15+) were surveyed. We only included those living in regional broadcasting areas (those living in areas where it is difficult/impossible to receive TV without an aerial were deliberately **excluded** from the survey through a combination of targeting calls in areas known to have UHF reception and excluding people who said they could not receive a signal without an aerial). The sample design was intended to capture a broadly representative viewpoint from each broadcaster's local 'footprint'.
- Results are broadly representative of the adult population in each region by age, gender, households size, ethnicity, and location (sampling and weighting was based on 2013 Census data).
- Sample sizes for each region and accompanying maximum margins of error are included in the table below.
- Please note that all differences in this report by subgroup are statistically significant at the 95% confidence level or greater.
- There are several places in the report where two or more results are combined (for example, combining 'every day', 'two or more times a week', and 'once a week' to form a 'weekly' figure). When this occurs the total may be one per cent higher or lower than the sum of each individual part. This is because of rounding (each figure has decimal places which are not shown in the report and this can have an impact on sums, e.g. 48.4% and 48.4% sums to 97%).

Sample sizes and accompanying maximum margins of error per broadcast area

| Area | Sample size | Maximum margin of error |
|---|--------------|-------------------------|
| Waikato | 316 | +/- 5.5% |
| Canterbury | 304 | +/- 5.6% |
| Hawke's Bay | 204 | +/- 6.9% |
| Nelson | 202 | +/- 6.9% |
| Invercargill | 202 | +/- 6.9% |
| Dunedin | 201 | +/- 6.9% |
| Whangarei | 201 | +/- 6.9% |
| Rotorua | 193 | +/- 7.0% |
| Kaitaia | 178 | +/- 7.3% |
| All those living in the above broadcasting areas | 2,001 | +/- 2.2% |

Method (ii)



- In this report results are generally presented by the *total* (i.e. all respondents living in regional broadcasting areas) or by *region* (all those living within a particular region).

Note about the spread of population across areas

- It should be noted that the results for the total (i.e. 'all respondents living in regional broadcasting areas') are representative of the total population across the combined broadcasting areas by age, gender, ethnicity, household size and location. This means that the results for small population broadcast areas account for a small proportion of the 'total' and vice-versa. The spread of population across the broadcasting regions is presented in the table below.

Spread of adult population across the broadcasting areas

| Area | % of the 15+ population |
|--------------|-------------------------|
| Canterbury | 34.1% |
| Waikato | 31.0% |
| Hawke's Bay | 8.4% |
| Dunedin | 8.1% |
| Nelson | 5.9% |
| Invercargill | 4.4% |
| Whangarei | 3.7% |
| Rotorua | 3.6% |
| Kaitaia | 0.7% |

Note about the names of channels

- The interview asked respondents about their own local channel only (not about 'regional channels' in general). (There were also some questions about the local news programme). Text substitution was used in the interview so that respondents understood we were only referring to their local broadcaster. The names of each channel (and local news programmes) are listed below. We do not refer to the channel names in the report (instead we refer to the name for each region, e.g. Waikato or Nelson).

Names of channels and news programmes

| Area | Name of local channel | Name of local news programme |
|--------------|-----------------------------------|---|
| Canterbury | CTV / Canterbury Television | CTV News |
| Waikato | TV Central | Central News |
| Hawke's Bay | Television Hawke's Bay / TVHB | Chatroom |
| Dunedin | 39 Dunedin Television / Channel 9 | 39 Dunedin News (this used to be called 9 Local News) |
| Nelson | Mainland Television | Mainland TV News |
| Invercargill | Cue TV | South Today |
| Whangarei | Channel North | Channel North News |
| Rotorua | TV Rotorua | City News |
| Kaitaia | Te Hiku Television | Haukainga or Te Hiku News |



Awareness of local channels

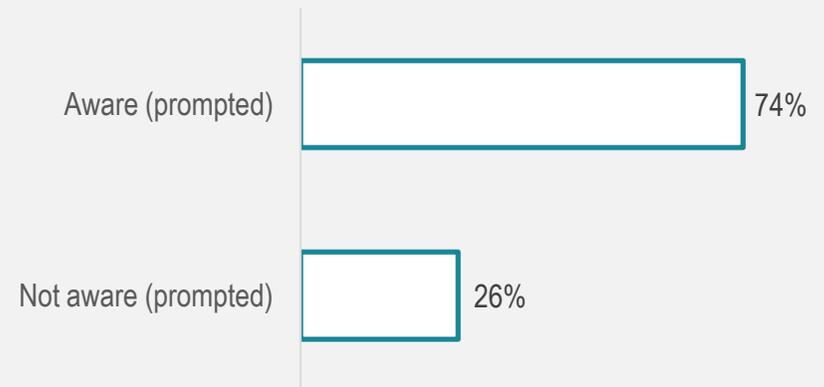
4 in 10 are aware of their local channel without prompting, but this increases to over 7 in 10 after prompting.

Unprompted awareness *(among general public)*



Source: Q1 and Q2. Can you name your local regional television channel? If so, please can you tell me the name of the channel?

Prompted awareness *(among general public)*



Source: Q2B. Just to check, have you heard of... LOCAL CHANNEL ... which is your local regional television?

Those who are aware without prompting are more engaged with their local channel compared to those who require prompting. This is demonstrated in viewership, 51% of the former watch their channel, compared with 39% of those who require prompting to recall the name of their local channel.

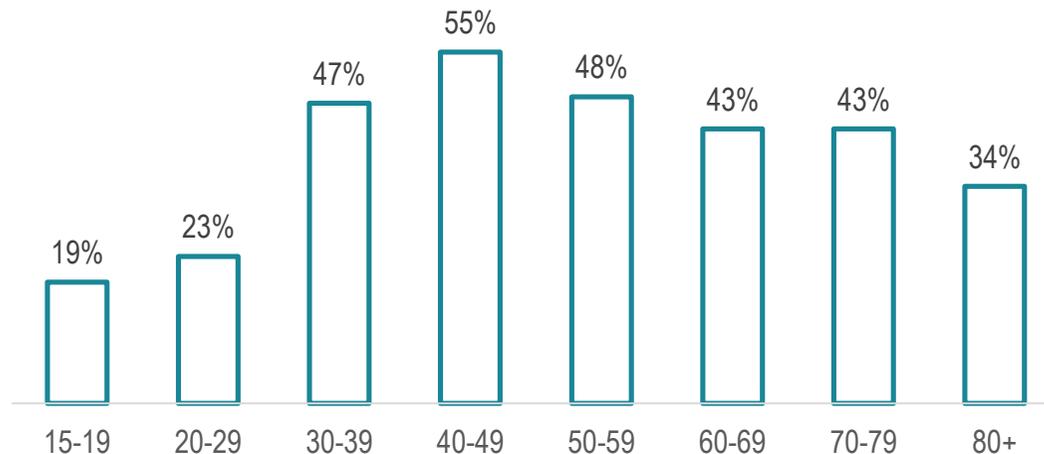


Subgroup analysis of unprompted awareness

41% are aware of their local channel (without prompting). Unprompted awareness is **higher** among:

- Those with a UHF aerial (58% compared with 33% of those who do not have a UHF aerial). This finding applies across the regions (with the exception of Kaitaia which does not have any respondents with UHF aerials).
- Males (45% compared to 37% of females). This finding applies across the regions with the exception of Kaitaia and Whangarei where there are no gender differences.
- Generally speaking, unprompted awareness is highest between the ages of 40 and 49. However, this difference is not statistically significant within individual regions, and there are some exceptions to this finding in particular regions (please refer to the regional reports for more details about unprompted awareness by age within region).

Unprompted awareness by age group
(within general public)

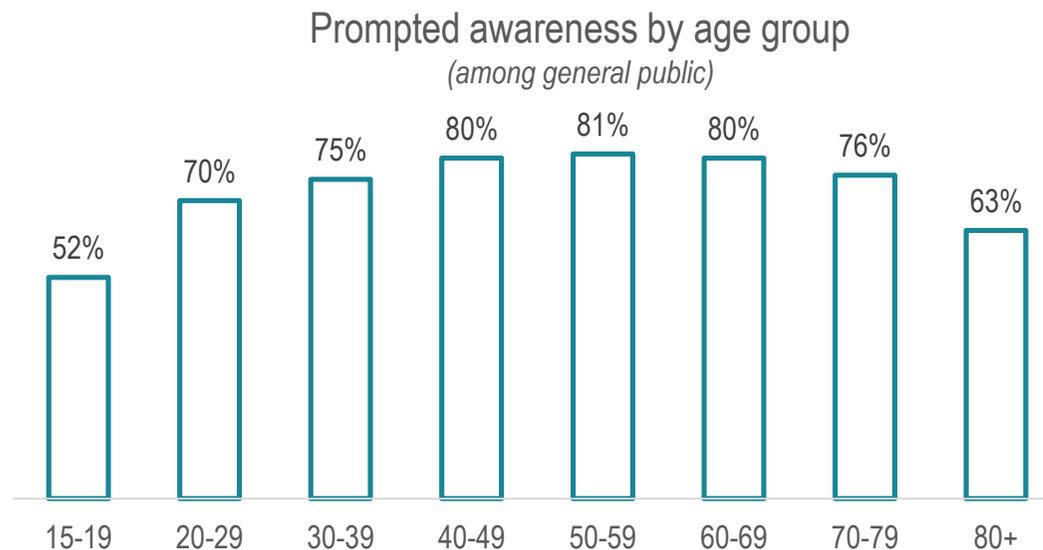


Subgroup analysis of prompted awareness

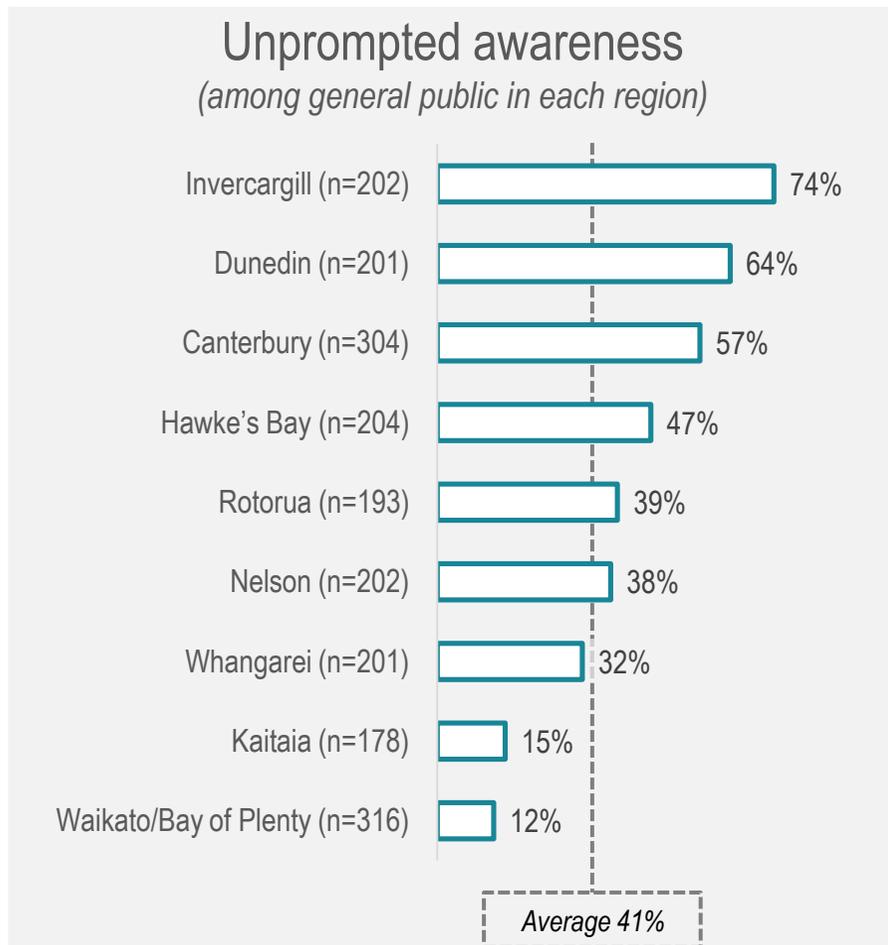


74% are aware of their local channel (after prompting). Prompted awareness is **higher** among:

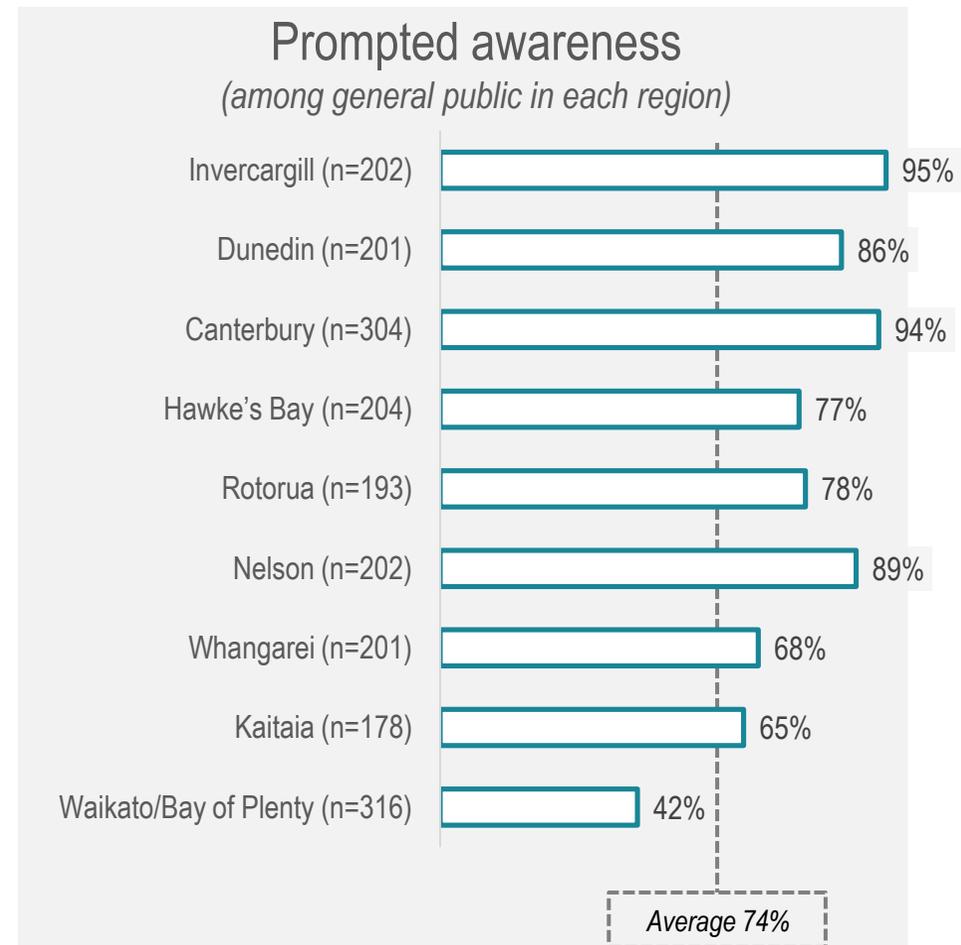
- Those with a UHF aerial (86% compared with 68% of those who do not have a UHF aerial). This finding applies across the regions.
- With the exception of Kaitaia and Whangarei, awareness is generally higher among those aged 40-69. Please refer to the chart below for details of the total sample, and refer to the regional reports for more details about prompted awareness by age within region.
- Please note that prompted awareness is lower among Maori respondents (57% vs. 76% of non-Maori). But in Kaitaia and Whangarei this tendency is *reversed* – Maori respondents in Kaitaia are *more* likely to be aware of their local channel (78% vs. 58% of non-Maori respondents in Kaitaia) and similar for Whangarei (89% vs. 63%).



Awareness of local channels varies by region (highest for Invercargill and lowest for Waikato)



Source: Q1 and Q2. Can you name your local regional television channel? If so, please can you tell me the name of the channel?



Source: Q2B. Just to check, have you heard of... LOCAL CHANNEL ... which is your local regional television?

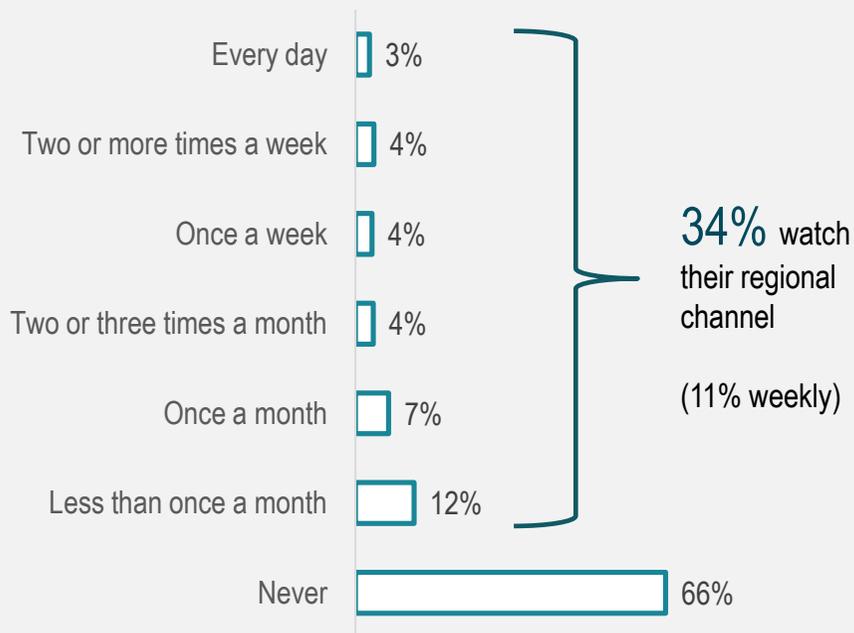
Prompted awareness is significantly higher than average for Invercargill, Dunedin, Canterbury and Nelson, but significantly lower for Kaitaia and Waikato.



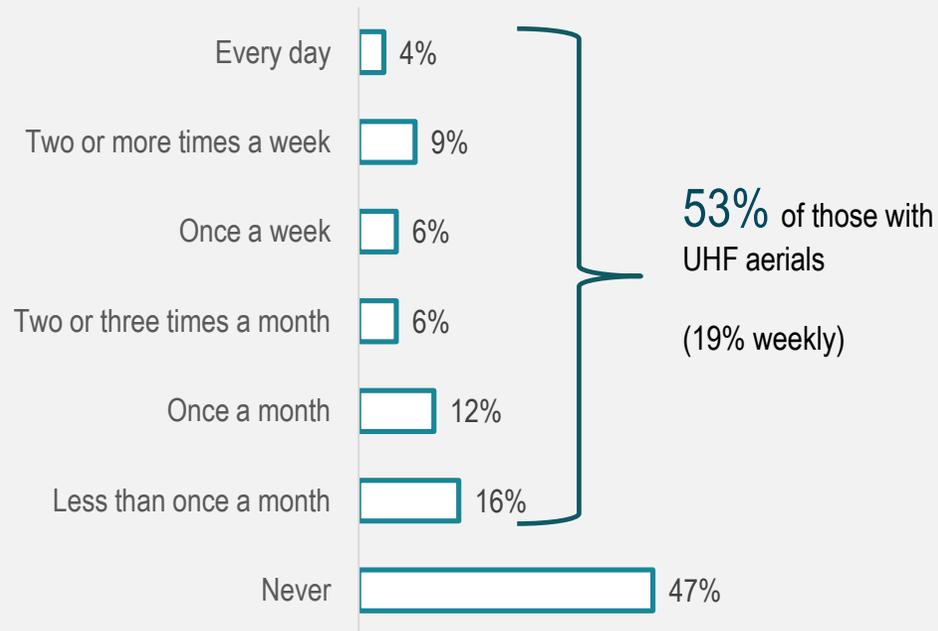
Viewership of local channels

Around a third watch their local channel (11% watch it at least weekly, with the remainder watching it less often). Viewership is higher among those with UHF aerials (please refer to the Appendix for information on reception equipment per region).

Frequency
(among general public)



Frequency
(among those with UHF aerials)



Source: Q3. How often do you tend to watch LOCAL CHANNEL?
BASE: All respondents (N=2,001)

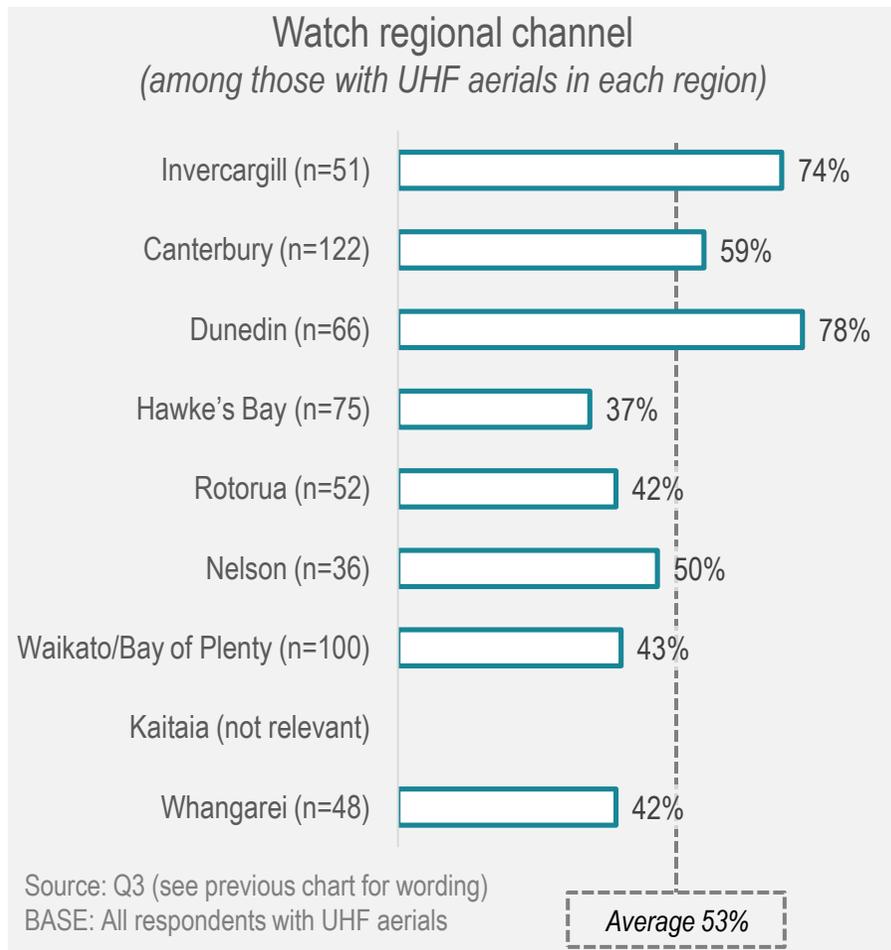
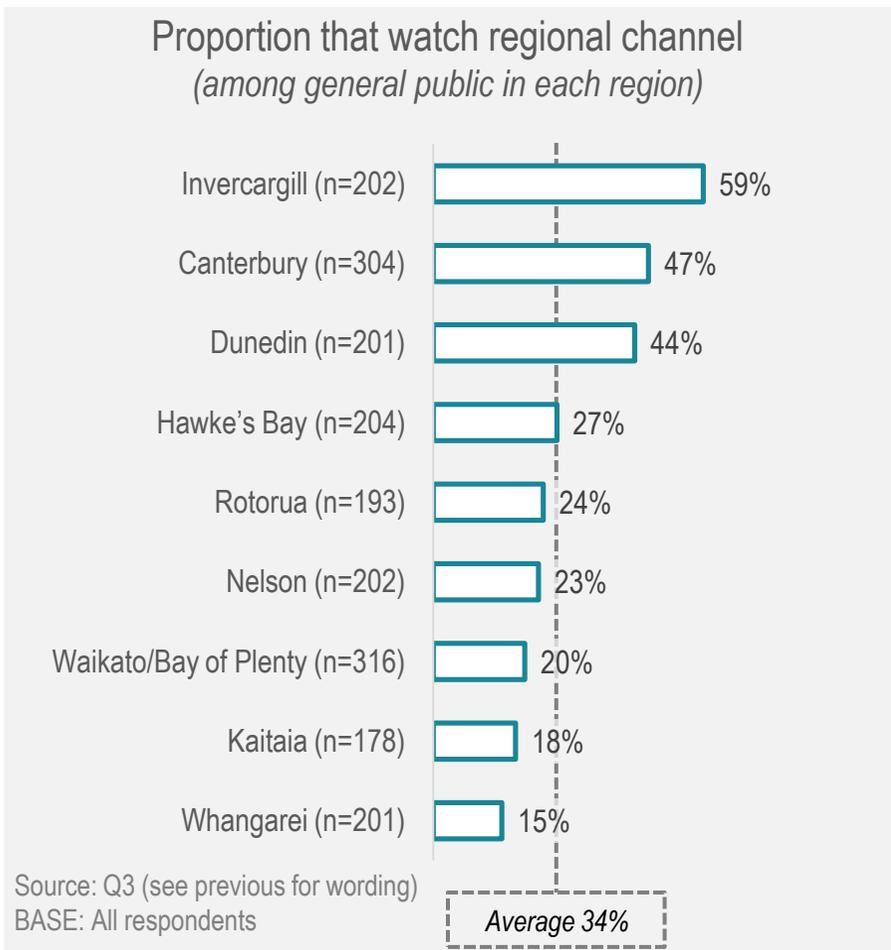
Source: Q3. How often do you tend to watch LOCAL CHANNEL?
BASE: All respondents with UHF aerials excluding Kaitaia (N=550)

Viewership in this report is defined as watching the channel no matter how frequently (i.e. even those who watch less than once a month are defined as 'viewers' for the purposes of this report). Viewership by region is described in the next slide.

Frequent viewing (defined as weekly) was higher than average for Invercargill (18% watch weekly there) and Canterbury (16%), and lower than average for Nelson (6%), Hawke's Bay (6%), and Whangarei (3%). (More detail on frequency by region will be available in regional reports).

The percentage of viewers varies by region (from 59% in Invercargill to 15% in Whangarei). Those with UHF aerials are more likely to be viewers

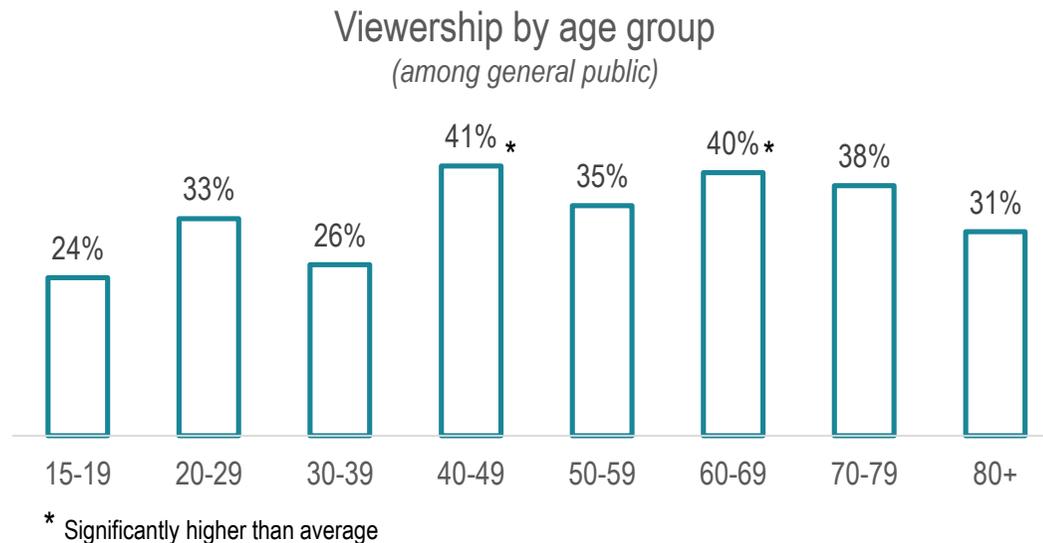
(although caution should be applied to some regional results by UHF aerials due to relatively small base sizes)



The proportion of the local population that have viewed the local channel is higher than average for Invercargill, Canterbury and Dunedin, and lower than average for Rotorua, Nelson, Waikato, Kaitaia, and Whangarei. However, viewership is higher among those who say they have Freeview and a UHF aerial. Base sizes of those 'with UHF aerials' are quite small because not everyone knows the nature of their antennae (refer to "n=" per region on the chart on the right-hand side above). Invercargill and Dunedin have a higher than average proportion of viewership among those UHF aerials, and Hawke's Bay has a lower than average proportion.

Subgroup analysis of viewership

34% watch their local channel (regardless of frequency). This is **higher** among those aged 40-49 and those aged 60-69 (please refer to chart below).

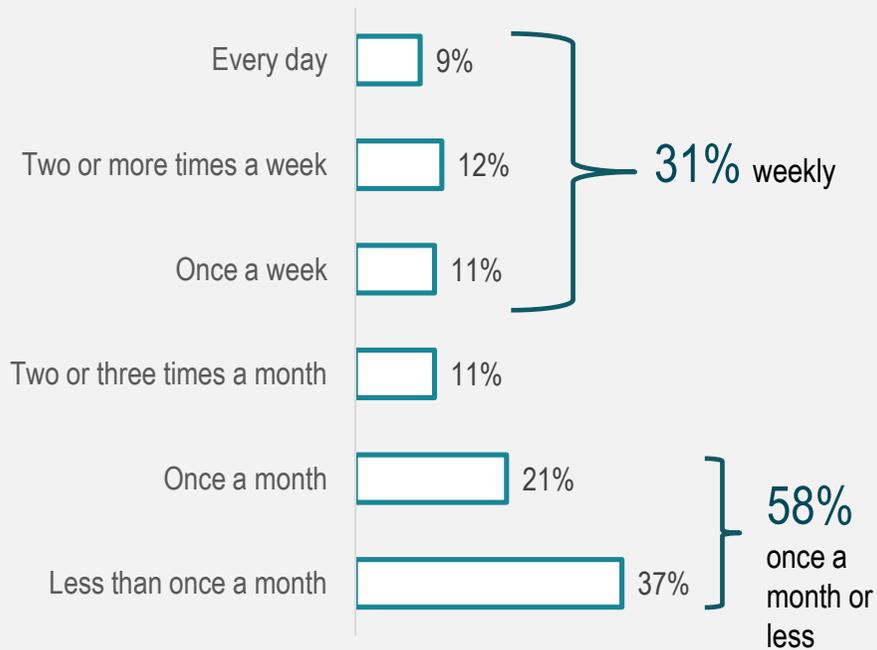


Viewership is lower among Maori respondents (23% vs. 35% of non-Maori). However, this situation is *reversed* in Kaitaia where Maori are *more likely* to view the local channel (29% vs. 12% of non-Maori in Kaitaia).

(In Whangarei there is no significant difference between Maori viewership and non-Maori viewership).

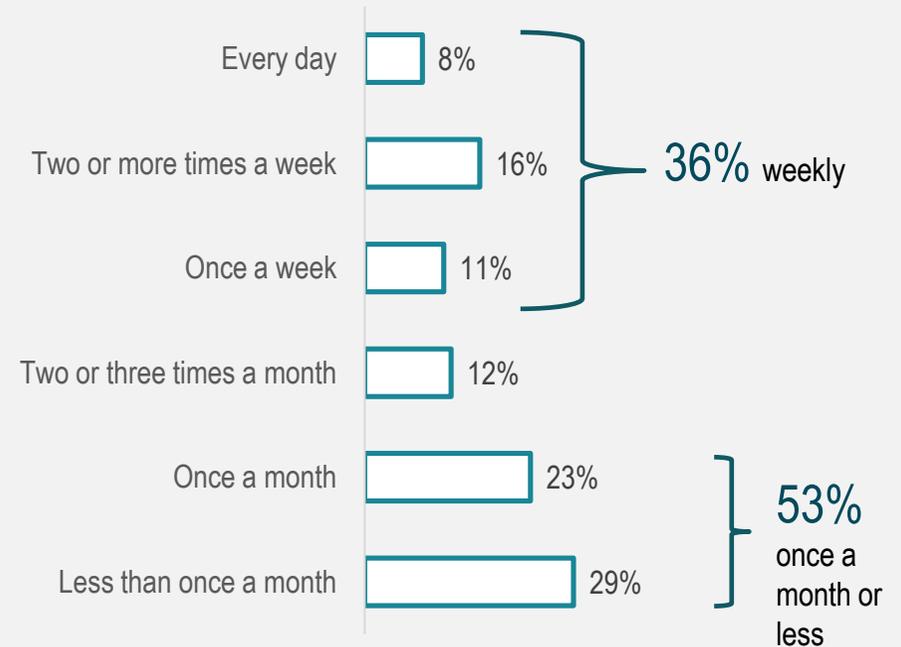
This chart re-presents the information from Slide 14 but includes *only* viewers of regional TV. It shows that among those who do tune in, 31% are watching at least weekly, whereas 58% are watching only once a month or less often.

Frequency
(among regional TV viewers)



Source: Q3. How often do you tend to watch LOCAL CHANNEL?
BASE: All regional TV viewers (N=659)

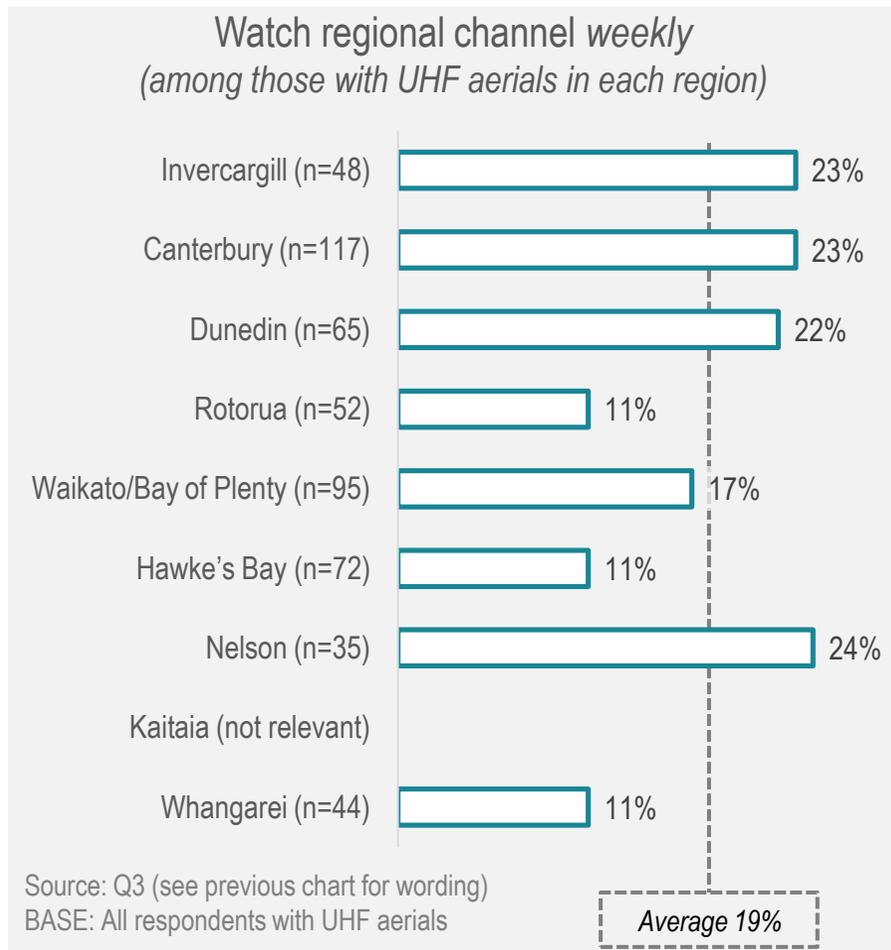
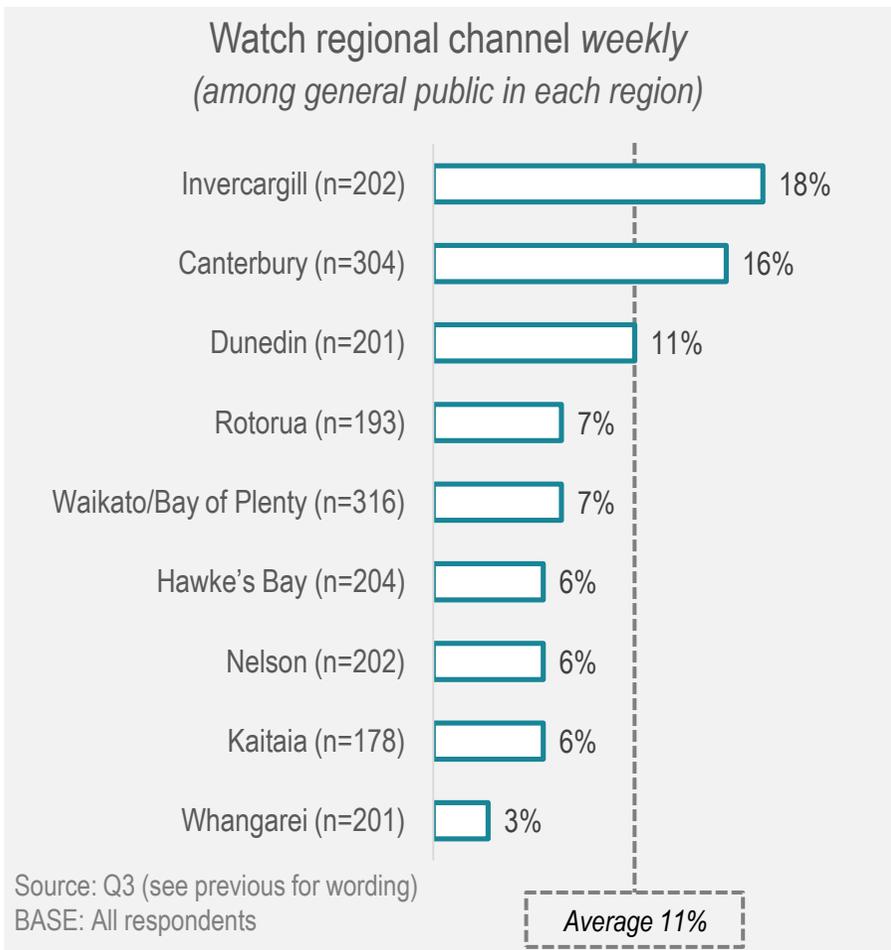
Frequency
(among regional TV viewers with UHF aerials)



Source: Q3. How often do you tend to watch LOCAL CHANNEL?
BASE: All respondents with UHF aerials excluding Kaitiaki (N=295)

The percentage of those who watch 'weekly' varied by region. Those with UHF aerials are more likely to be weekly viewers.

(although caution should be applied to some regional results by UHF aerials due to relatively small base sizes)



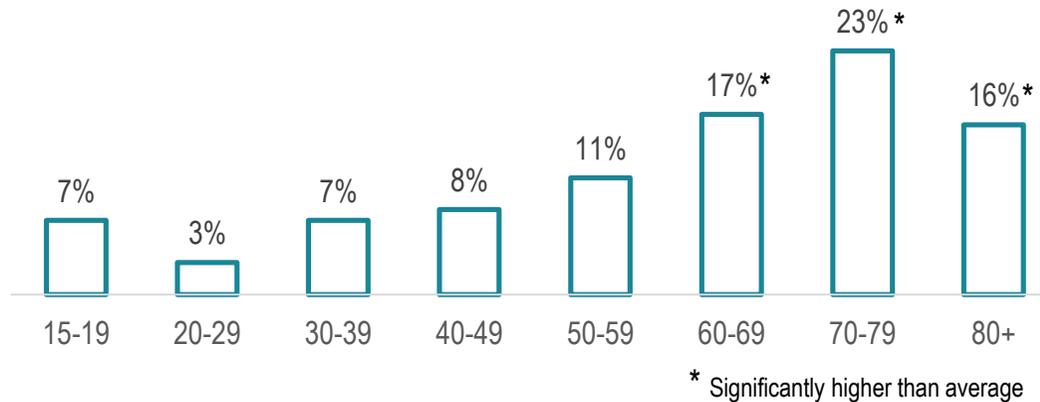
The proportion of the local population that have viewed the local channel weekly is higher than average for Invercargill and Canterbury, and lower than average for Nelson, Hawke's Bay, and Whangarei. However, viewership is higher among those who say they have Freeview and a UHF aerial. Base sizes of those 'with UHF aerials' are quite small because not everyone knows the nature of their antennae (refer to "n=" per region on the chart on the right-hand side above).

Subgroup analysis of 'weekly' viewing



11% watch their local channel weekly. This is **higher** among those with UHF aerials (19%). But weekly viewing is also higher among those who do not have Freeview or SKY (21%). Although this is a small group in the overall population (5% of the regional audience) it indicates that there is a small group who regularly watch regional television online (they are particularly young – with almost half this group being aged under 20). But generally it is older people who watch regional TV weekly, as indicated in the chart below.

Weekly viewing by age group
(among general public)

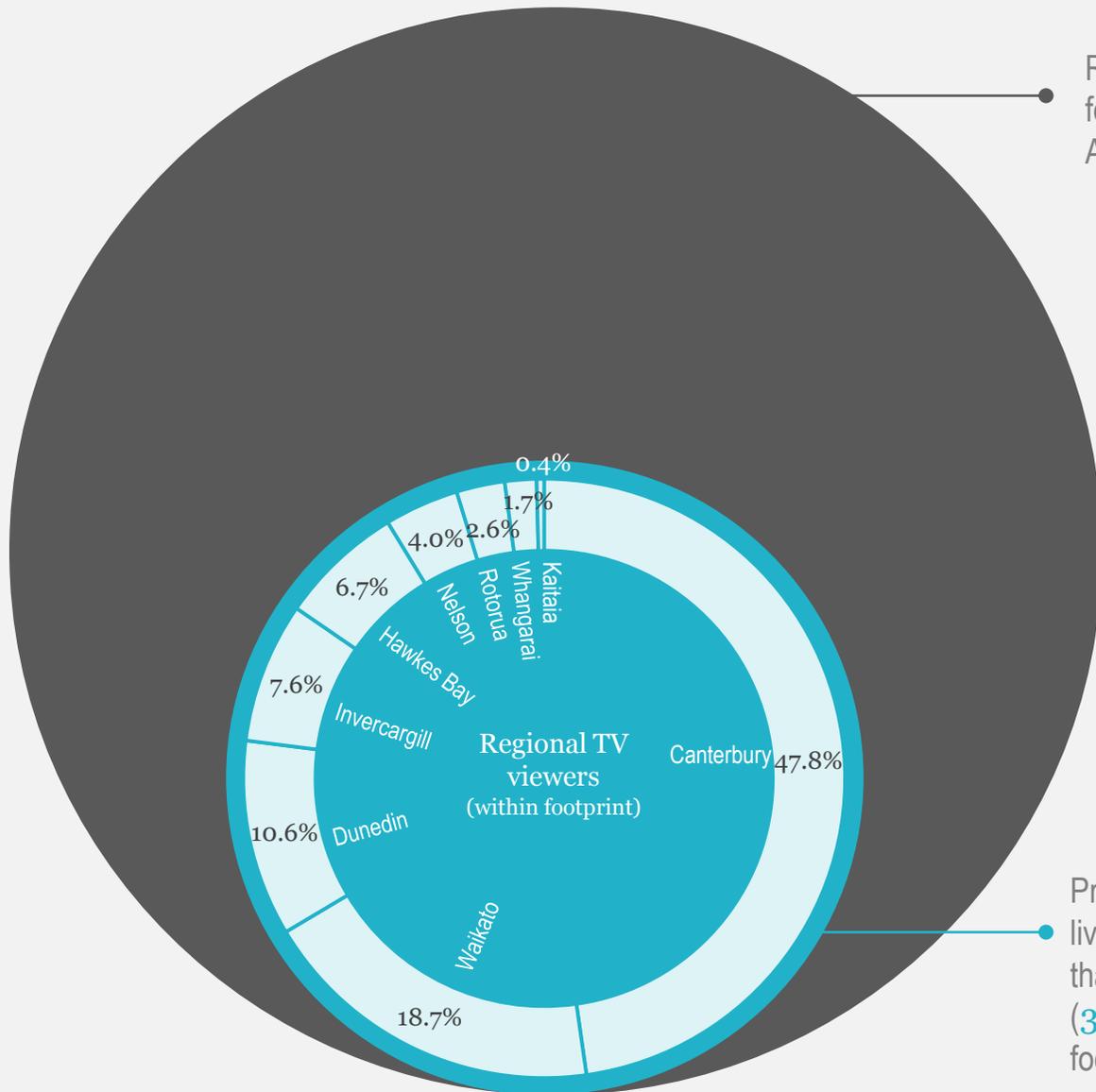


'Other European' respondents are more likely than other ethnic groups to be 'weekly' viewers (16% vs. the average of 11%).

Maori respondents are generally *less* likely to be weekly viewers (6% vs. 11% of non-Maori respondents). But in Kaitaia the reverse is true (15% of Maori in Kaitaia are weekly viewers vs. 2% of non-Maori respondents in Kaitaia).



HOW IS THE AUDIENCE SPREAD ACROSS THE REGIONS SURVEYED?



Regional broadcaster's footprint (excluding Auckland).

Proportion of adults living in surveyed areas that watch regional TV (34% of adults living in footprint).

COMMENTARY:

This chart is different from previous charts in that it shows how those who say 'they watch regional television' are spread across the nine areas of New Zealand surveyed.

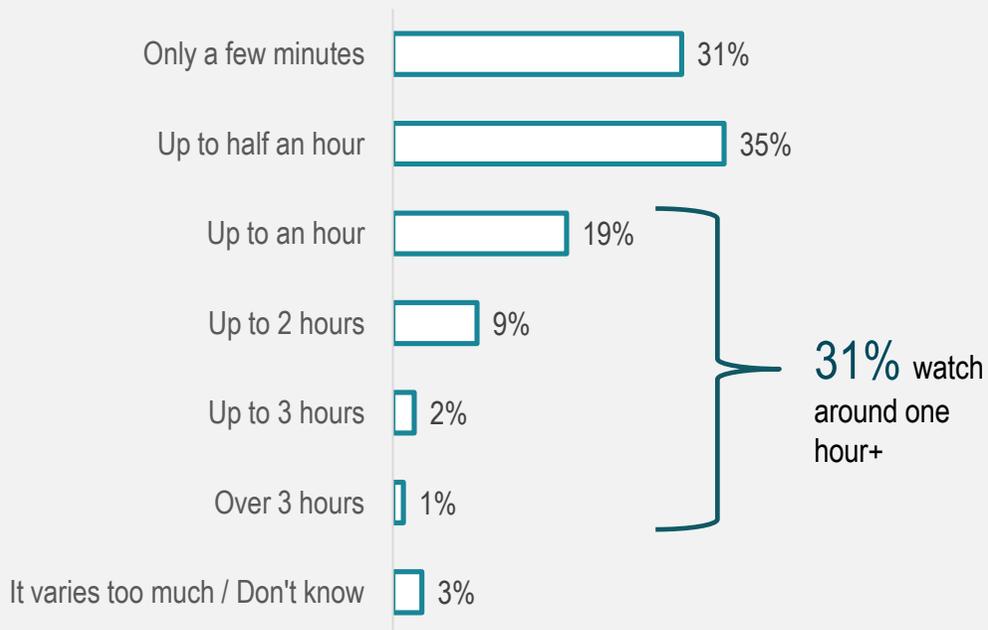
Some regional broadcast areas have large populations (such as Canterbury) whereas others have small populations (such as Kaitiaki). Some regions also have a relatively high proportion of regional TV viewers (such as Dunedin) and this will influence the data in the chart.

The largest share of the regional viewing public are located in Canterbury which has a large population and a reasonably high proportion of viewership (47% of Canterbury watch their local channel).

Although a relatively low proportion of Waikato respondents say they watch regional TV (20%), this region still accounts for 19% of the regional audience surveyed. This is because it is a large area encompassing a number of population centres.

Most watch regional TV for less than an hour (when they do tune in). 31% watch for around an hour or longer.

Duration (among regional TV viewers)



Regions with significant differences from the average:

Less likely to have viewers that watch for an hour+

- Whangarei (only 14% watch for an hour+)
- Dunedin (11%)

(There are no regions that are significantly *more* likely than average to watch for one hour or longer).

Subgroups significantly more likely to watch for 1 hour or longer:

- Older females (55% of females aged 70+)
- People living alone (46%)

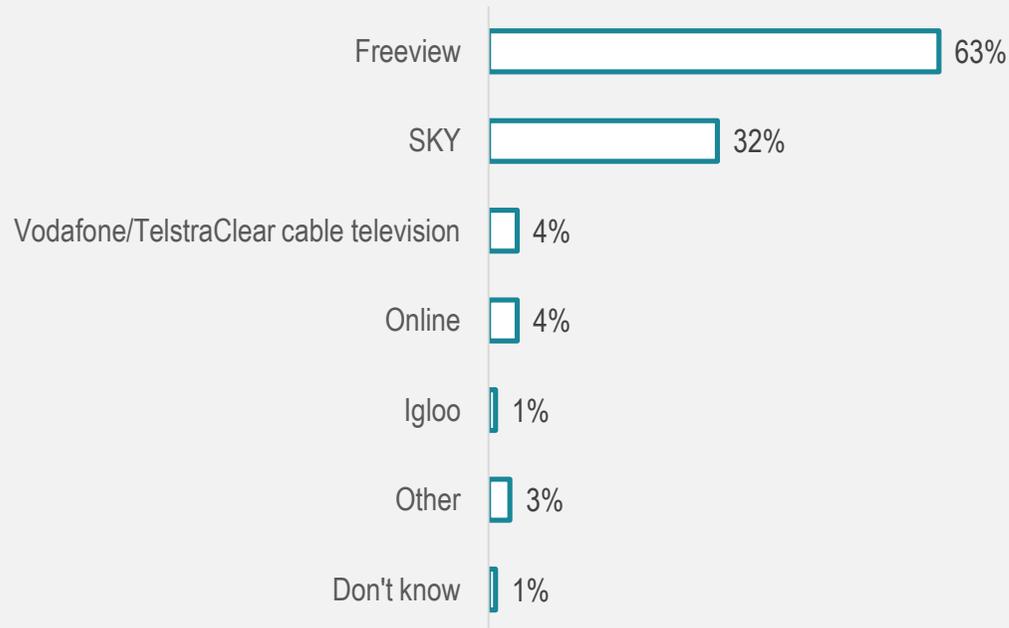
(These subgroup differences apply across the regions).

Source: Q3C Please think about a typical day when you watch LOCAL CHANNEL. How long would you spend watching it?
BASE: All people who watch their local channel (N=679)

People say they watch their local channel via Freeview or SKY. Other research conducted by Colmar Brunton (including the Digital Tracker) suggests that people often have a poor recollection of their TV provider so this data should be treated with caution.

How people say they view regional TV

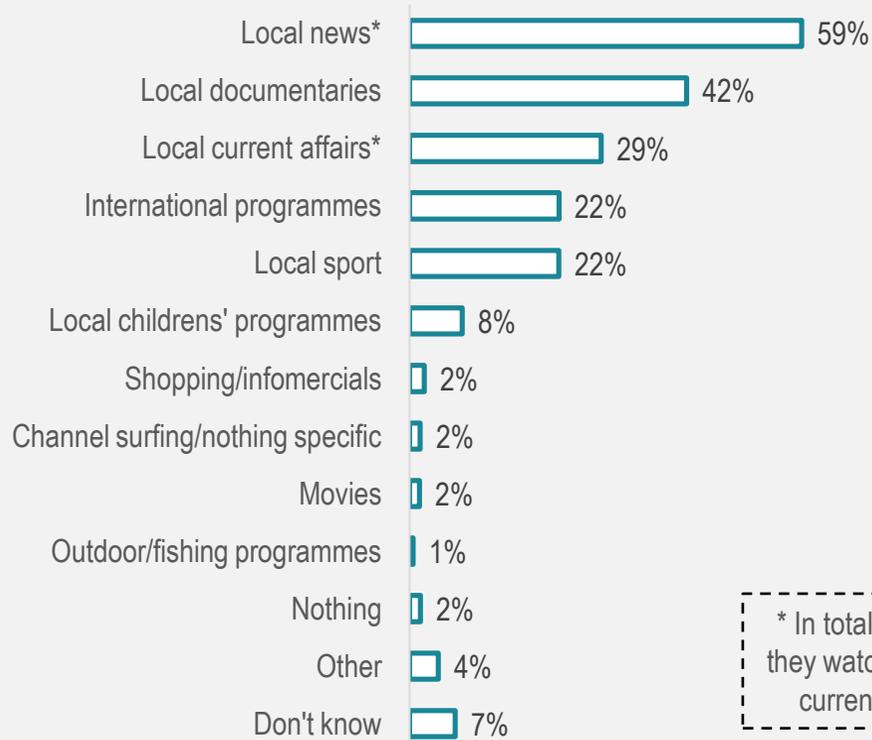
(regional TV viewers excluding Invercargill where regional TV is available on SKY and Freeview)



Source: Q4. How do you typically watch LOCAL CHANNEL these days?

People mainly watch local news (59% of viewers) or local documentaries (42%). Around 1 in 5 watch local sport or international programmes.

Programmes watched (among regional TV viewers)



* In total 64% say they watch news or current affairs

Regions with significant differences from the average:

Kaitaia

- Higher:
 - Local current affairs 46% (average: 29%)
 - Local children's programmes 20% (average 8%)

Whangarei

- Lower: Local sport 3% (average 22%)

Hawkes Bay

- Lower: Local news 41% (average:59%)

Dunedin

- Higher: Local news 75% (average: 59%)
- Lower: International programmes 11% (average: 22%)

Invercargill

- Higher: Local sport 39% (average: 22%)
- Lower:
 - Local documentaries 21% (average: 42%)
 - International programmes 11% (average: 22%)

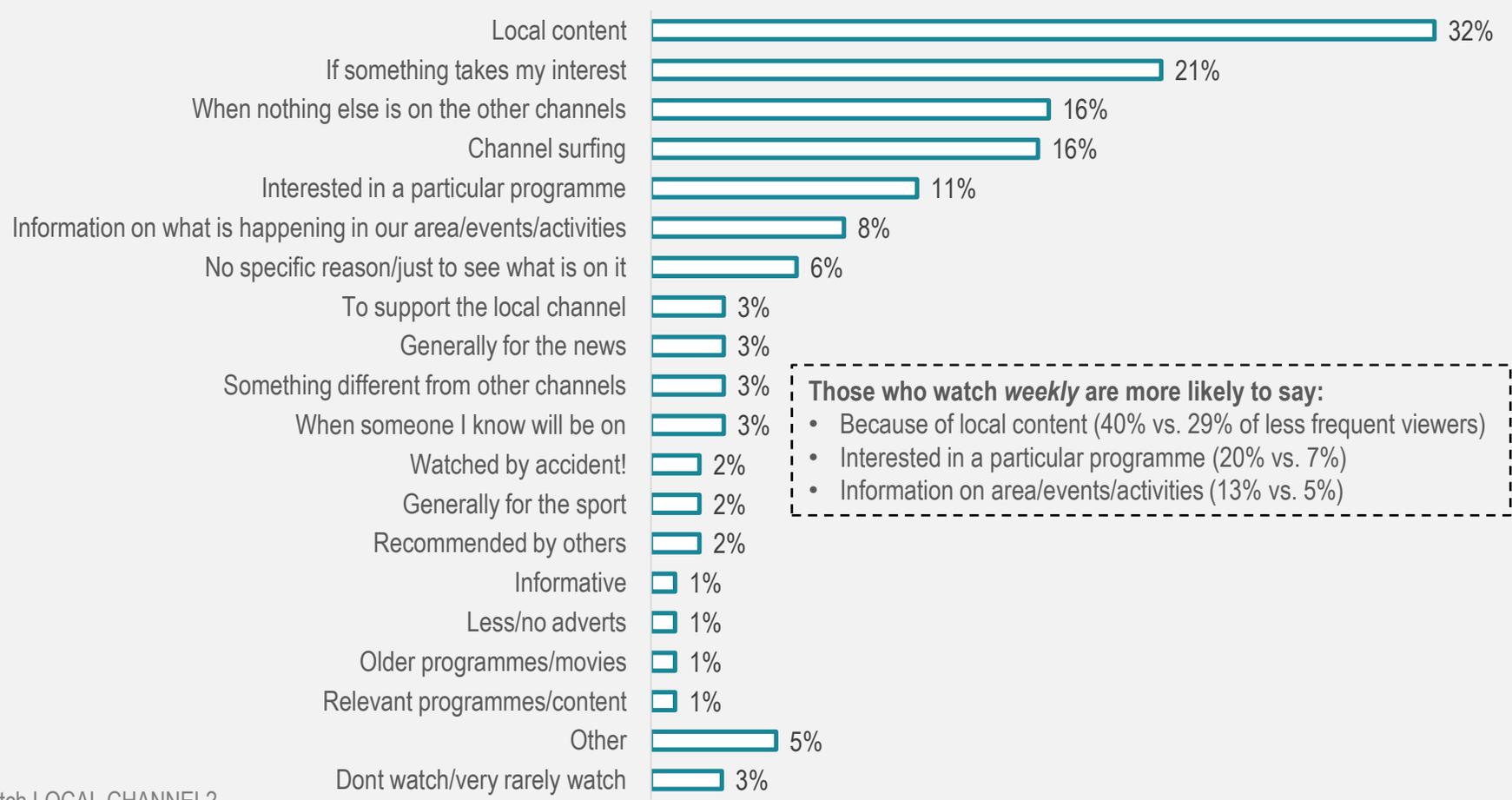
Source: Q5. What type of programmes do you watch on LOCAL CHANNEL?

Older respondents (aged 70+) are more likely to watch local news (71%) or local current affairs (48%). Maori respondents are more likely to watch local news (74%).



People mainly watch regional TV because of the local content (32% of those who watch) or because something takes their interest (21%). But it is also relatively common to watch regional TV because nothing else is on (16%) or because they are channel surfing (16%).

Why people watch regional TV (among regional TV viewers)



Source: Q6. Why do you watch LOCAL CHANNEL?



Answers to this question did not vary much by region, apart from in Invercargill where a higher proportion say they watch for local content (49% compared to the average of 32%) or for local sport (10% vs. 2%). Also a higher proportion in Dunedin say they watch because of local news (10% compared to the average of 3%).

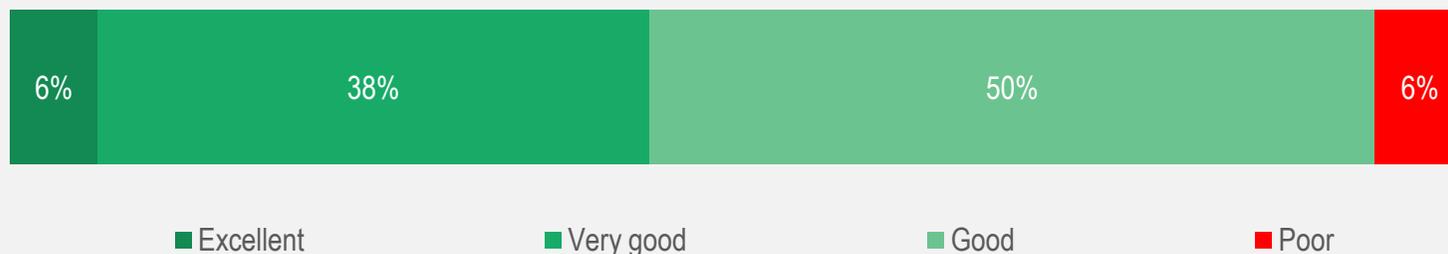




Views on the quality of local channel

Most perceive the overall quality of their regional channel to be 'good' (50%) or 'very good' (38%). In total 44% say 'excellent' or 'very good' (those aged 70+ are more likely to say this).

Perceived quality of local channel
(among regional TV viewers)



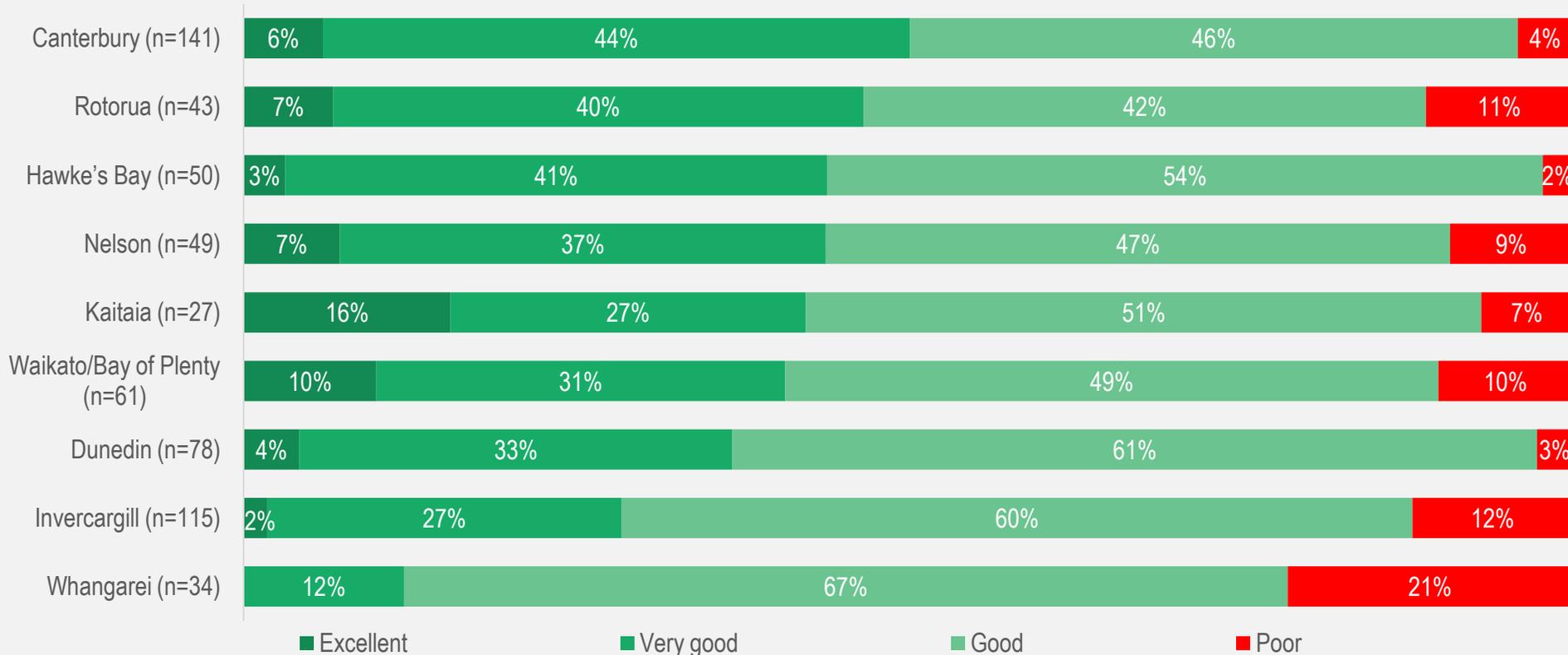
44% say 'excellent' or 'very good'.
Significant differences from the average:

- Whangarei (lower: 12%)
- Invercargill (lower: 28%)
- Those aged 70+ are more positive across the regions (53% rate regional TV as 'excellent' or 'very good' compared to 39% of those aged under 70)

Source: Q7. What do you think of the overall quality of LOCAL CHANNEL? Would you say it is...

Views on quality vary by region – viewers in Whangarei and Invercargill are more likely than other regions to rate quality as ‘poor’

Perceived quality of local channel by region
(among regional TV viewers)

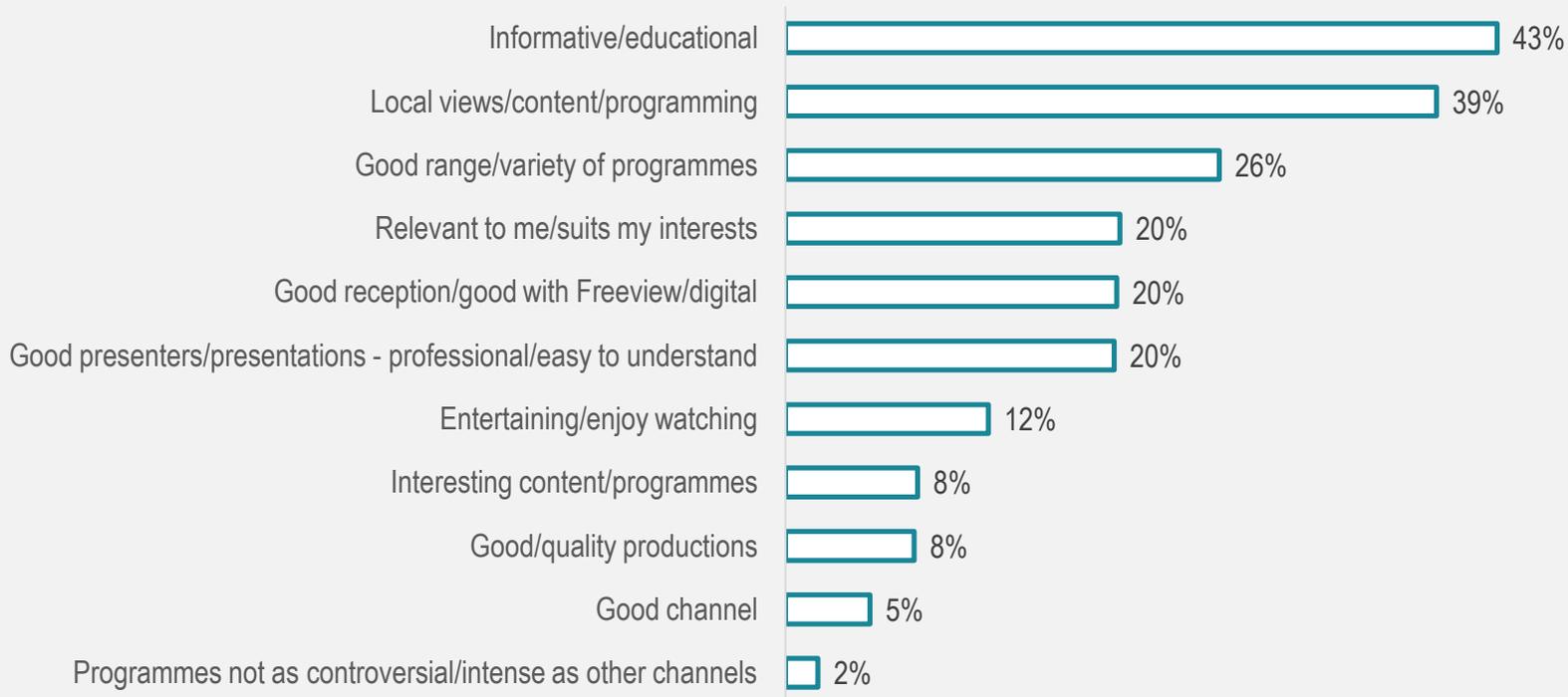


Source: Q7. What do you think of the overall quality of LOCAL CHANNEL? Would you say it is...



Most who rated content as 'excellent' say this is either because of the informative nature of the programmes (43%) or because the channel presents a local viewpoint (39%).

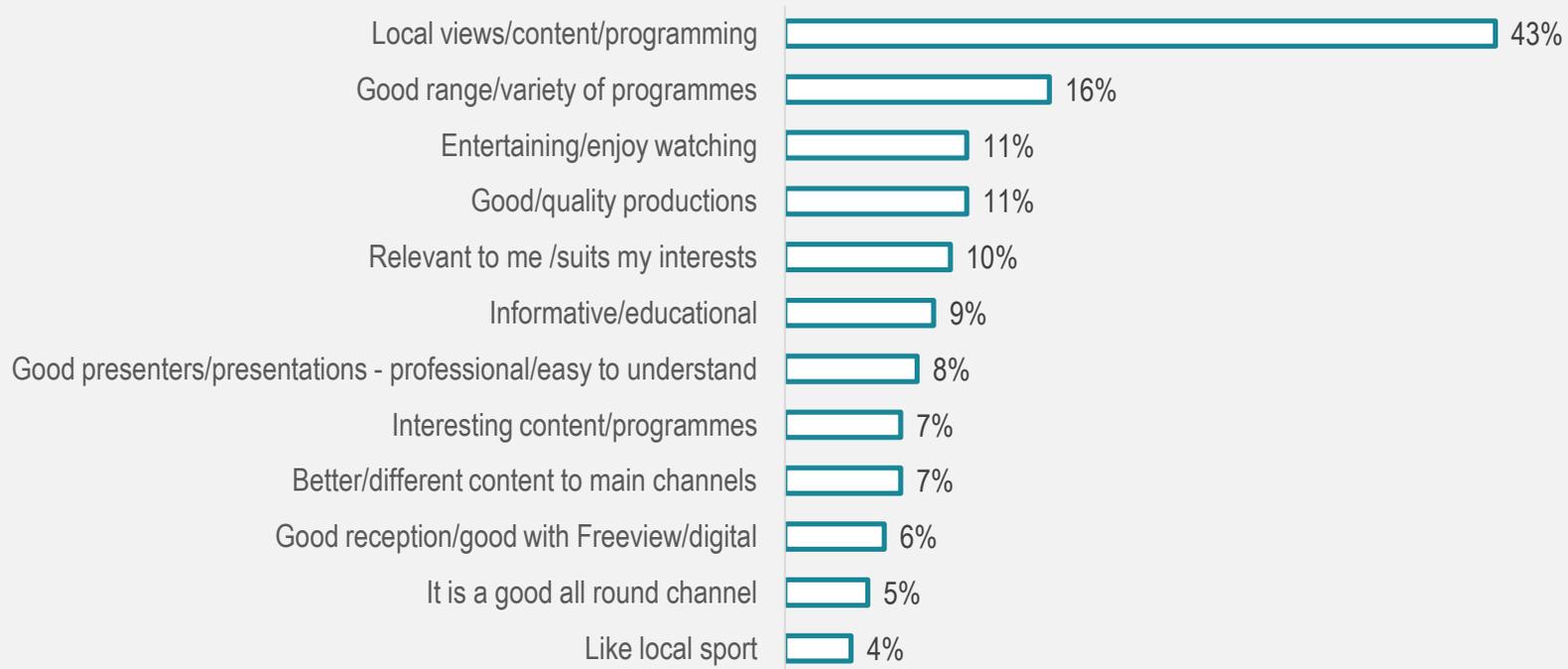
Reasons for rating channel 'excellent' *(among regional TV viewers who think the quality is excellent)*



Source: Q7b. Can you tell me the reasons why you think LOCAL CHANNEL is INSERT RESPONSE FROM Q7?

Those who rated content as 'very good' often say this is because of the local viewpoint (43% of those rating very good).

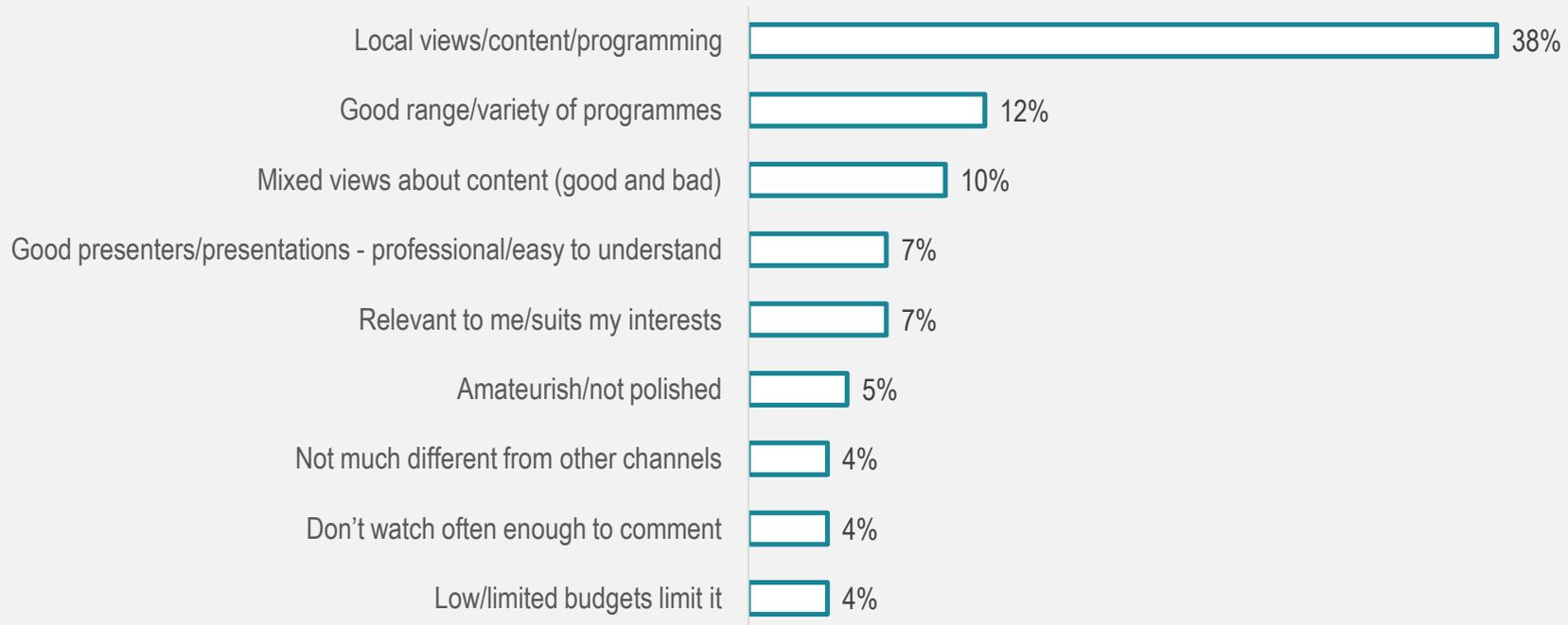
Reasons for rating channel 'very good' (among regional TV viewers who think the quality is very good)



Source: Q7b. Can you tell me the reasons why you think LOCAL CHANNEL is INSERT RESPONSE FROM Q7?

Those who rated content as 'good' often like the local viewpoint and range of programmes (although a lower proportion compared with those answering more positively). But some rating their channel as 'good' hold mixed views about the content and some say the channel is amateurish.

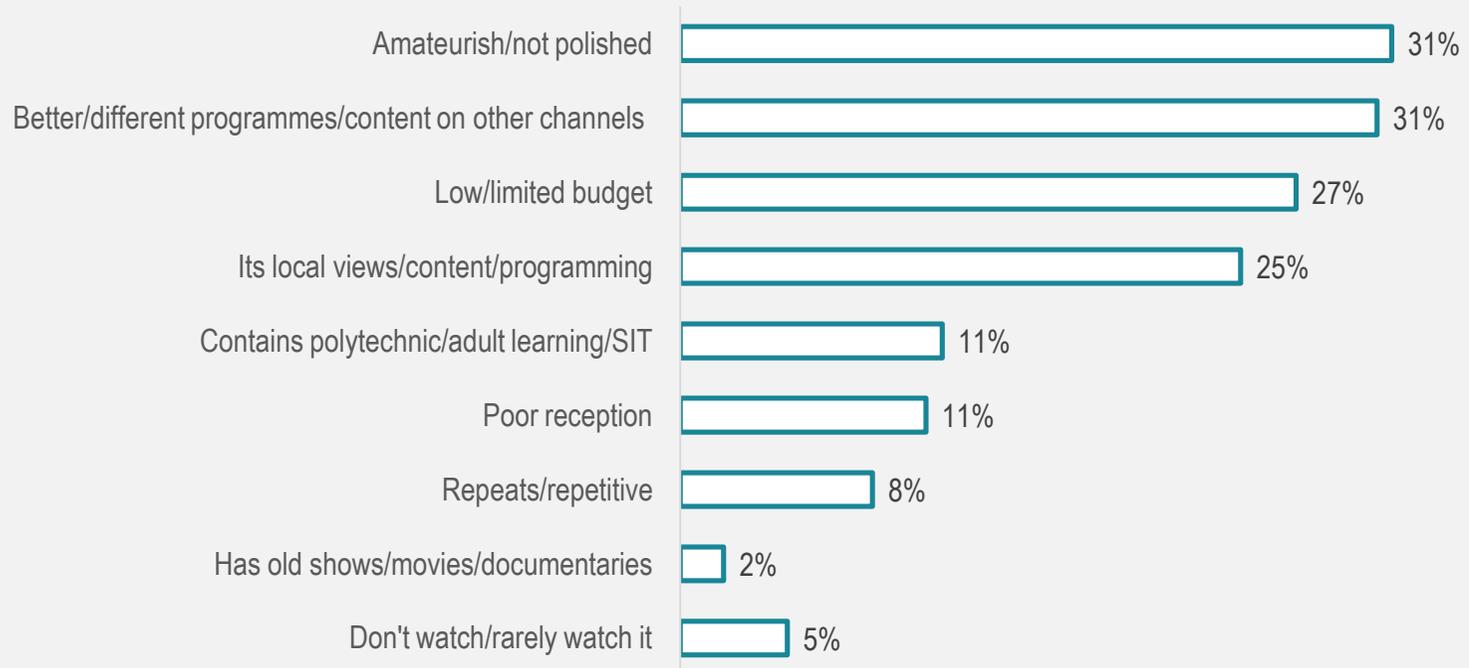
Reasons for rating channel 'good' (among regional TV viewers who think the quality is good)



Source: Q7b. Can you tell me the reasons why you think LOCAL CHANNEL is INSERT RESPONSE FROM Q7?

Most who say quality is 'poor' say that it is either amateurish (31% of those rating quality as 'poor'), low budget (27%) or that there is better content elsewhere (31%).

Reasons for rating channel 'poor'
(among regional TV viewers who think the quality is poor)



Source: Q7b. Can you tell me the reasons why you think LOCAL CHANNEL is INSERT RESPONSE FROM Q7?



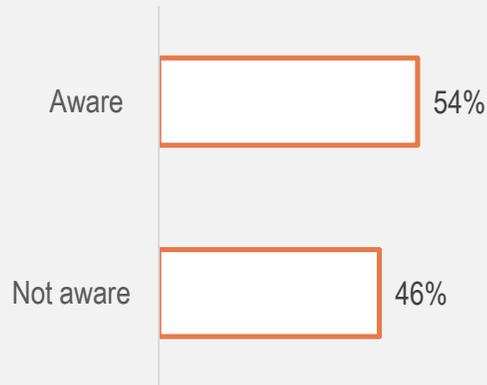
Awareness and viewership of local news

**Colmar
Brunton**
A Millward Brown Company

Just over half (54%) of those who watch their local channel are aware of the local news programme (after prompting with its name). Because 59% of respondents say they watch local news (see slide 23), this means that 5% watch the local news without knowing its name.

Prompted awareness of local news programme

(among regional TV viewers)



Subgroup differences from the average:

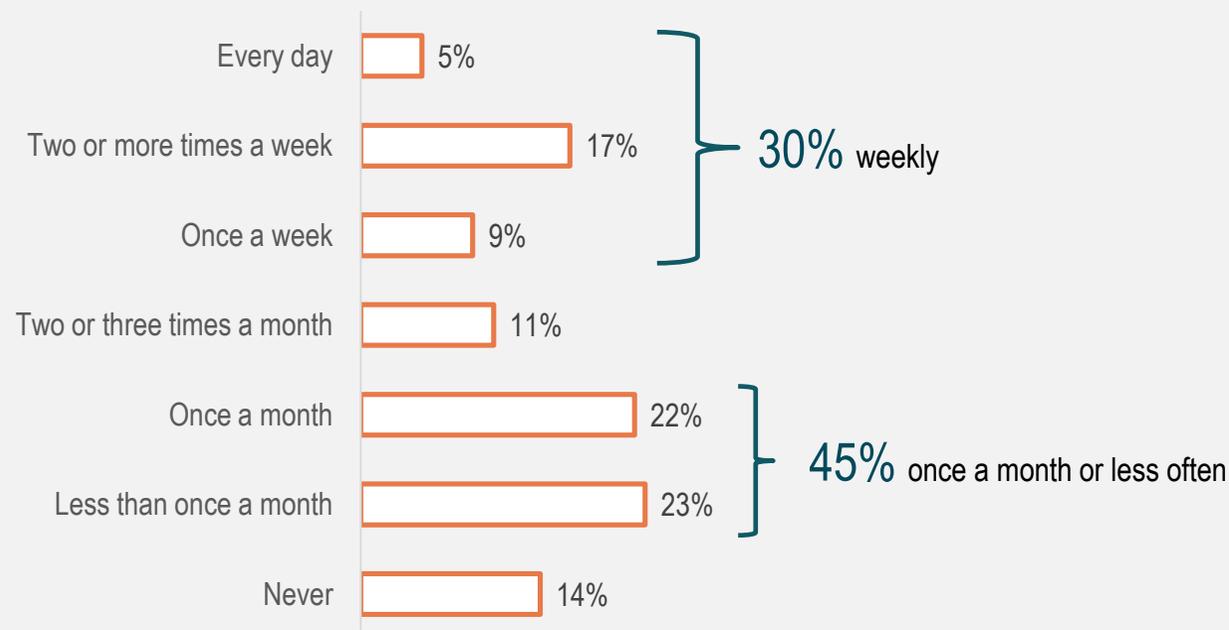
Aware (average - 54%)

- Lower:
 - Kaitaia (33%)
 - Rotorua (36%)
 - Nelson (36%)
 - Maori respondents (39% - with the exception of Kaitaia and Whangarei where Maori are *more likely* to know about their local news programme but due to small base sizes for this question these differences are not statistically significant).
- Higher:
 - Invercargill (73%)
 - Those aged 70+ (63%)

Source: Q7C. Just to check, did you know that LOCAL CHANNEL has a news programme called NEWS PROGRAMME?

30% of those aware of their local news programme watch it at least weekly, 11% watch two to three times a month, 45% watch it once a month or less often, and 14% say they 'never' watch it.

Frequency of watching local news programme
(among regional TV viewers who are aware of their local news programme)



Source: Q7D. How often do you tend to watch NEWS PROGRAMME?
BASE: All people who are aware of their local news (N=363)

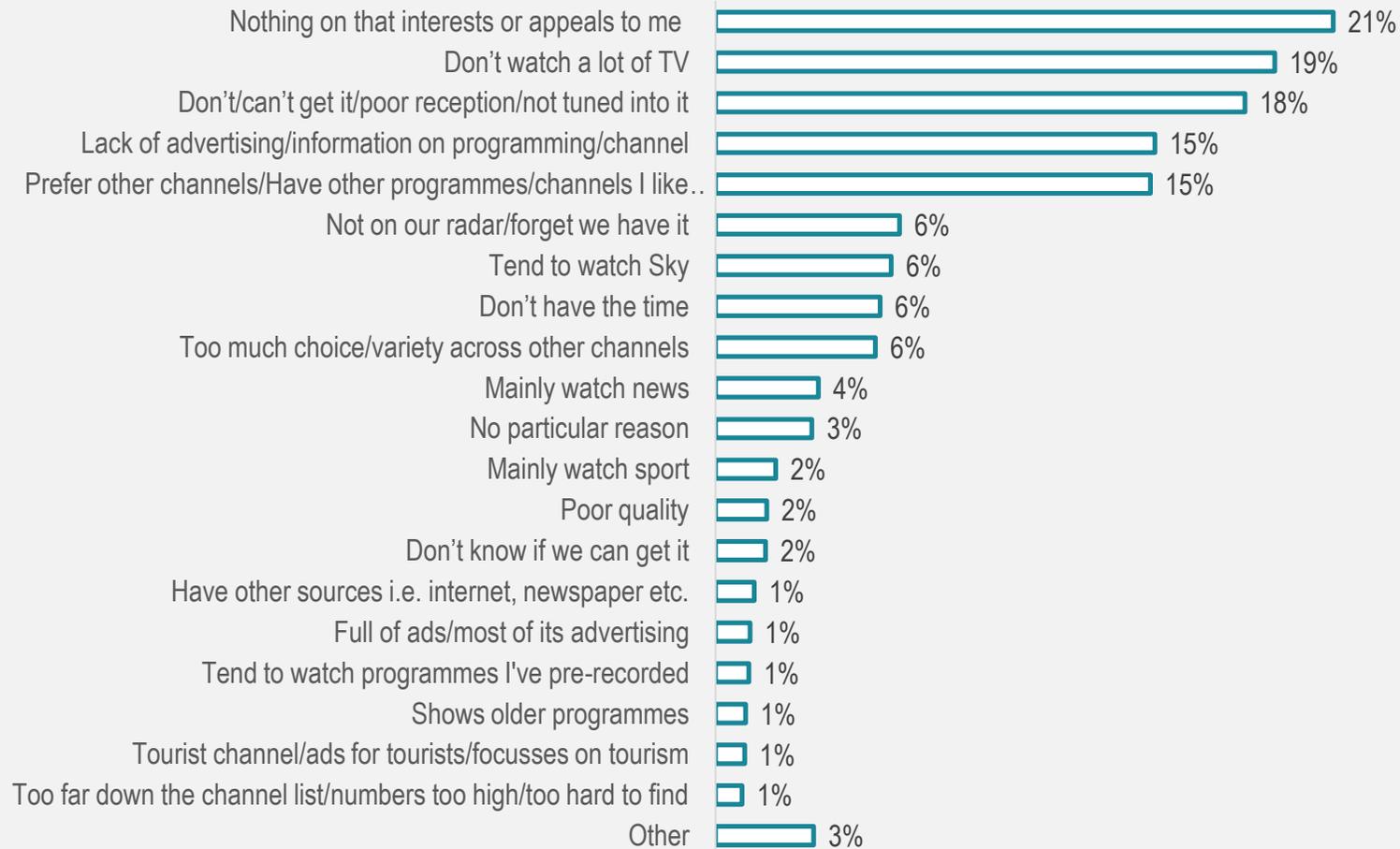




Why some people are not watching their local channel

Most of those who are aware of the channel but do not watch it (or watch it infrequently) say this is because of a lack of interest in the content (21%), or because they don't watch much TV (19%) – but there are also those who know they cannot receive it (18%).

Why people do not watch regional TV (among those who do not watch/watch infrequently)



Source: Q8. Can you tell me the reasons why you don't watch LOCAL CHANNEL very often? / do not watch LOCAL CHANNEL?

Some commentary on the last slide



Those who watch the channel *infrequently* (rather than never) are more likely to say that they do not watch the local channel because:

- They don't watch a lot of TV in general (29% vs. 15% of those who 'never' watch the channel)
- They prefer other channels or programmes (26% vs. 12%)
- There is too much choice/variety on other channels (14% vs. 3%)
- Or that the channel is simply not on their radar (10% vs. 5%).

Whereas those who *never* watch the channel (despite being aware of it) are more likely to say this is because they cannot get the signal (23% vs. 3% of those who watch infrequently) or that there is a lack of advertising/promotion about the channel (18% vs. 7%).

The following areas have higher proportions who say they cannot get reception:

- Kaitaia (38%)
- Nelson (34%)
- Whangarei (32%)
- Dunedin (30%).

[9 in 10 of those who say they cannot get reception are those without UHF aerials].

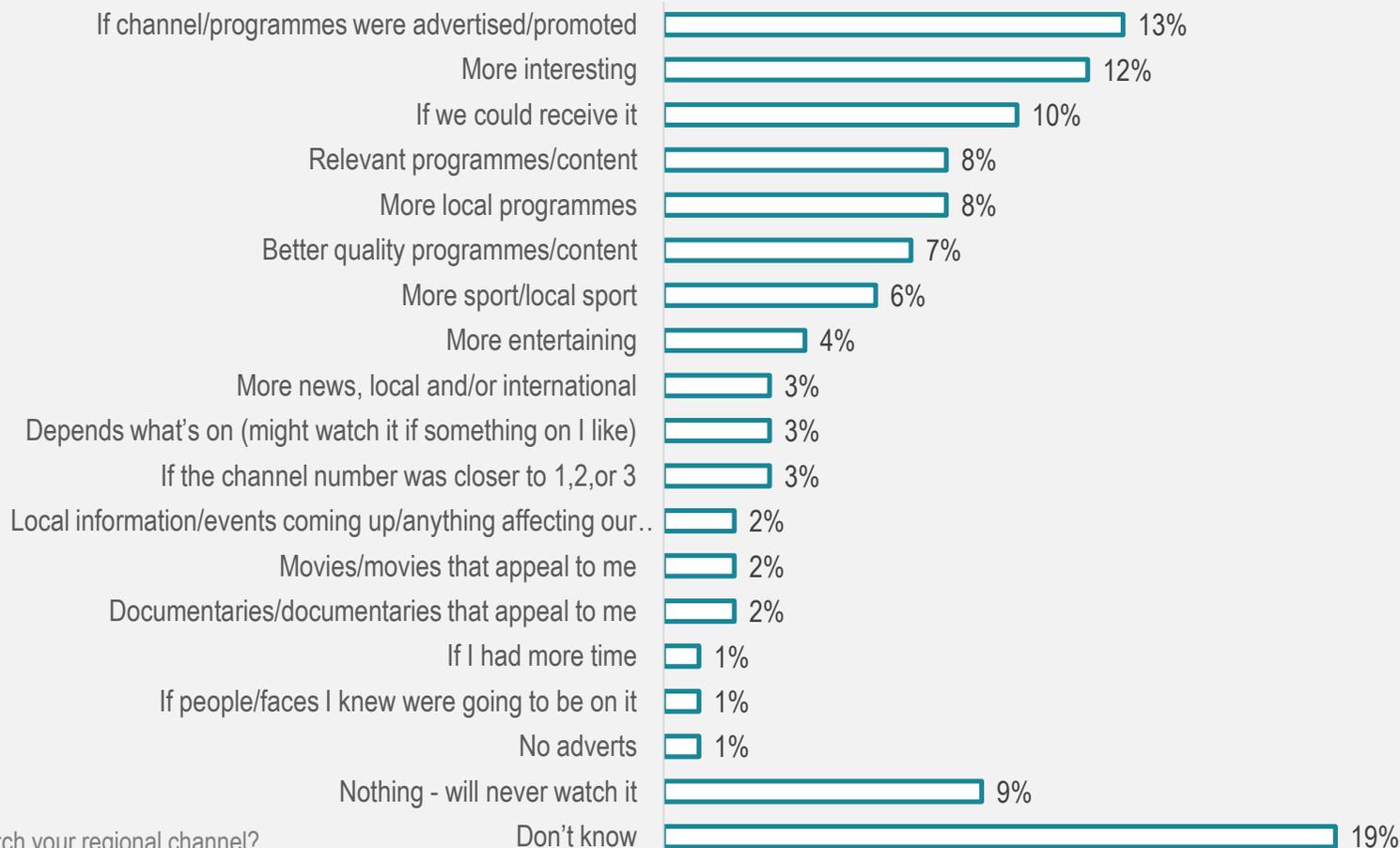
Other regional variations include:

- Those in Waikato who do not watch their regional channel are more likely to say this is because of a lack of advertising or promotion (24% vs. the average of 15% across the total sample).
- Those in Kaitaia are more likely to say they do not watch because the programmes are too Maori based (12% vs. 0% average)
- Those in Hawke's Bay and Rotorua are more likely to say the channel focusses too much on tourism (7% in both areas compared to the average of 1%). Respondents in Rotorua are also more likely to say it is 'full of ads' (4% vs. the average of 1%).
- Those in Invercargill are more likely to say they prefer other channels or other programmes (24% vs. the average of 15%).



People who are unaware of the channel or don't watch it very often say that they would watch it more if there was more promotion (13%) or if there was more interesting content (12%).

What might make people watch regional TV
(among those who do not watch/watch infrequently/are unaware of regional channel)



Source: Q9. What might make you watch your regional channel?

Some commentary on the last slide



- Those who watch the channel infrequently are more likely to say they would watch it more if there was more advertising and promotion (20% compared with 13% average).
- Those who have never heard of the channel are more likely to say that more news might make them watch (6% vs. 3%) or more local information about events/things impacting local area (4% vs. 2%).

Regional variations include:

- Whangarei respondents are more likely to say they would watch if there was more local programmes (15% vs. the average of 8%).
- Rotorua and Dunedin respondents are more likely to say they would watch if there were more local faces they recognised (4% for both areas vs. 1%).
- Nelson respondents are more likely to say they would watch if there was more local information about events/things happening in the local area (5% vs. 2%).
- Those in Invercargill are more likely to say they would watch if there was more entertaining programmes (8% vs. 4%)

(Similar regional variations in the ability to receive the regional channel's signal are apparent in answers to this question as already covered in the previous commentary slide, e.g. not being able to get the signal is more of an issue for respondents in Kaitia etc.).





Appendix: reception equipment and demographic profile per region

Kaitaia, Whangarei, and Nelson have higher than average proportions of Freeview satellite customers and lower proportions of Freeview UHF customers. (Please note this is based on a self-reported question and so is subject to respondents self-identifying their own reception equipment).

Reception equipment per region

| | Total | Kaitaia | Whangarei | Waikato | Hawke's Bay | Rotorua | Nelson | Canterbury | Dunedin | Invercargill |
|--------------------------------------|-------|---------|-----------|---------|-------------|---------|--------|------------|---------|--------------|
| Number of interviews (n=) | 2001 | 178 | 201 | 316 | 204 | 193 | 202 | 304 | 201 | 202 |
| Don't watch TV | 2% | 5% | 0% | 2% | 1% | 3% | 3% | 2% | 2% | 2% |
| Freeview dish only | 23% | 51% | 38% | 23% | 24% | 26% | 35% | 18% | 23% | 26% |
| Freeview UHF | 30% | 0% | 20% | 29% | 37% | 27% | 15% | 35% | 34% | 25% |
| Freeview (unsure how it is received) | 7% | 3% | 5% | 9% | 4% | 6% | 6% | 8% | 7% | 2% |
| Pay TV or Iglou only | 35% | 41% | 33% | 36% | 33% | 35% | 39% | 33% | 32% | 44% |
| Unsure of TV provider | 2% | 0% | 3% | 2% | 1% | 2% | 1% | 4% | 2% | 1% |

Green is significantly higher than average. Red is significantly lower than average.

Sample profile per region



| | Total | Kaitaia | Whangarei | Waikato | Hawke's Bay | Rotorua | Nelson | Canterbury | Dunedin | Invercargill |
|---------------------------|-------|---------|-----------|---------|-------------|---------|--------|------------|---------|--------------|
| Number of interviews (n=) | 2001 | 178 | 201 | 316 | 204 | 193 | 202 | 304 | 201 | 202 |
| Male | 48% | 48% | 47% | 48% | 47% | 47% | 48% | 49% | 47% | 49% |
| Female | 52% | 52% | 53% | 52% | 53% | 53% | 52% | 51% | 53% | 51% |
| 18-29 | 24% | 22% | 22% | 25% | 22% | 25% | 19% | 24% | 30% | 24% |
| 30-49 | 31% | 31% | 24% | 33% | 30% | 29% | 33% | 30% | 28% | 34% |
| 50-69 | 31% | 32% | 38% | 29% | 33% | 30% | 33% | 32% | 31% | 29% |
| 70+ | 13% | 16% | 16% | 13% | 15% | 15% | 14% | 13% | 10% | 12% |
| NZ Euro | 82% | 64% | 72% | 80% | 85% | 74% | 89% | 81% | 89% | 84% |
| Maori | 12% | 35% | 20% | 16% | 17% | 29% | 7% | 6% | 3% | 10% |
| Pacific Island | 2% | 1% | 4% | 1% | 4% | 2% | 1% | 1% | 4% | 2% |
| Asian | 3% | 2% | 3% | 3% | 1% | 3% | 2% | 5% | 2% | 4% |
| European | 8% | 15% | 5% | 6% | 6% | 5% | 9% | 10% | 7% | 5% |
| Another ethnic group | 2% | 4% | 5% | 2% | 1% | 1% | 1% | 3% | 2% | 3% |

Green is significantly higher than average. Red is significantly lower than average.