

**Women's Television Viewing
Behaviour
Ratings Analysis**

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January 2000

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1. Executive Summary

Under the Broadcasting Act, NZ On Air is charged with ensuring a range of programmes is available that provide for the interests of women. Research into women's television preferences has previously been commissioned by NZ On Air as follows:

- *Literature Review: Women's Television Viewing Preferences (1999)*
- *Radio and Television Programming Market Research Report (1998)*

In order for NZ On Air to further assess how best to meet women's television needs it is appropriate to conduct additional research using different methodologies. By using an independent quantitative measure, i.e. ratings data, further insight may be gained into women's viewing behaviour.

While NZ On Air regularly monitors the television ratings, in its 1999/2000 year, in conjunction with AC Nielsen, it embarked on a specific ratings research project on women's viewing. Data collection took place in the latter part of 1999 and 11 demographic categories were established covering the variables of age, ethnicity and socio-economic status. The study looked at 1998's top programmes - both New Zealand only and a combination of New Zealand and overseas programmes. A range of individual programmes primarily of New Zealand origin from the drama/comedy, documentary and information genres were also considered along with the viewing patterns of each of the 11 categories.

At this stage it is important to acknowledge that ratings data has a number of limitations in providing information on viewing interests:

- the ratings data records only what is screening on the television set at a given time and who is in the room, it does not measure attention, concentration or enjoyment.
- previous research indicates that television viewing behaviour is influenced by a range of variables beyond actual programme preference. For example women have been shown to watch programmes of little interest to them in order to spend time with family members. In addition the previous research reveals men are more likely to control the television remote than women and again this may impact upon women's viewing behaviour (CM Research, 1998).
- the sample size for certain demographic categories may be too low to provide reliable information.
- ratings apply only to programmes currently on offer and can therefore offer no insight into possible programme preferences beyond the bounds of what is now available.

In strict terms then, ratings are a measure only of viewing behaviour and not of programme interest per se. However, it is reasonable to assume that there is at least some correlation between viewing behaviour and programme interest. In addition, the ratings remain the only independent and quantitative measure of what people are actually watching. They therefore remain a useful tool in continuing to seek answers to the following questions:

- what local programmes do women like to watch?

- which of these are NZ On Air supported programmes and which are being delivered by the independent market?
- what types of programmes are women obtaining from overseas that may not be available locally?
- what types of programmes, not currently provided by the local market, can NZ On Air consider providing which would appeal to women.
- do all women watch the same sort of television programmes and if not, what are the differences between different categories of women?
- do women want the same sort of television programmes as men, and if not, what are the differences?

The results of the rating data are found in full in the following report. All of the rating graphs and tables obtained can be found in the appendices. The key results were as follows:

- Women (that is all women 20+) are most likely to watch television during primetime, that is between the hours of 6pm and 10.00pm
- Women's (that is all women 20+) top programmes encompass a wide range of television genres including news, current affairs, sport, information, entertainment, drama and comedy.
- New Zealand programmes feature predominantly among women's top programmes, with news, current affairs, sport and information programmes attracting the largest audiences. Again this relates to the broad category of all women 20+.
- Women's viewing behaviours differ subtly but consistently and importantly from men's (see section 8.3). However, it is important that the focus does not become solely "what do women watch that men do not watch". This is because the ratings data indicates that many of women's top programmes are also viewed by large numbers of men.
- Women cannot be viewed as a homogenous group as major differences in television viewing behaviour is found according to ethnicity, age and socio-economic group. In particular the viewing behaviour of Maori women, women of other ethnic origins, young women and women from socio-economic groups 5-6 are not the same as the general category of women 20+.
- The differences in television viewing behaviour between women of different ethnic origins and different ages appear to be more significant than the differences between females as a total group and the general viewing audience. However, it is likely that if women's viewing behaviour was compared directly to men's that more overt disparity would be seen.
- Women's viewing behaviour is generally consistent with their channel preference. For example, most older women (50+) predominantly watch TV One and programmes appearing on this channel correspondingly achieve high ratings for this group. It is not easy to delineate whether viewers are attracted by channel or programme - although of course in practice the two are usually synonymous (see section 10).
- The ratings data shows consistency with the findings of previous research work (see section 10).

These findings have certain implications for NZ On Air regarding its obligation to provide for the interests of women.

Firstly, when considering support for a programme “of interest to women”, it is necessary to determine which women are likely to be served. As indicated above, a programme that attracts strong viewing levels from one group of women may remain relatively unwatched by another group.

Secondly, it seems that as a group (all women 20+) women are presently well served with a range of local programming that they watch in large numbers. Some of these programmes, such as documentaries, are provided by NZ On Air. The majority, however, are provided by the market including news, current affairs, sport and information programmes on topics such as consumer issues, gardening, food and renovations.

NZ On Air is therefore not currently the only, or even the main, provider of programmes of interest to women. Further to this, where programmes are being provided for by the market NZ On Air does not need to offer support in order to ensure women needs are being served. This point is made keeping in mind the limitations of the ratings data noted earlier.

Yet it does seem that there are some programmes being provided from overseas, and not available locally, that appeal to women. By looking at these programmes, NZ On Air may find opportunities to provide an even broader range of local programmes of interest to women. In addition, there is clear support for certain types of programming provided by public funds which NZ On Air can continue to support and may wish to consider supporting even further.

Documentary, for example, is a popular genre amongst most groups of women but obtains less support amongst young women, Maori women, women of other ethnic origins, and women from socio-economic groups 5 and 6. NZ On Air may wish to consider whether there is more it could do to provide documentaries of interest to these groups.

Drama is a key area in which women are predominantly watching overseas material rather than local programmes. A range of local drama could appeal such as a long-run serial for older women (the comparative overseas programme being *Coronation Street*), historical drama (*Bramwell*), or community based, character driven drama (*Blue Heelers*). These types of drama are likely to be popular with the general category of all women 20+ and women with similar viewing behaviour to this group.

Maori women, women of other ethnic origins and young women support movies on TV and may therefore prefer telefeatures. Young women currently strongly support *Shortland Street* but could also be well served with a local sit-com or drama-comedy series (*Ally McBeal*, *Veronica's Closet*). Women from socio-economic groups 5 and 6 could benefit from local, more action oriented, TV2 type drama (*Water Rats*).

Finally, most women like to see themselves and their interests reflected on screen, whether this is through documentary, drama, comedy or another programme genre. For Maori women, for example, this may mean seeing Maori faces, issues and perspectives on television. For women overall, this may mean seeing a range of women in pivotal roles.

In summary, the issue of serving women's interests with regard to television is a complex one. This ratings study provides one more insight into the topic and will therefore assist NZ On Air as it strives to successfully discharge its obligations to New Zealand's female television audience.

2. Introduction

Under Section 36c(i) of the Broadcasting Act, NZ On Air is specifically charged with ensuring that a range of broadcasts is available to provide for the interests of women.

NZ On Air has previously conducted research into women's television viewing behaviour and preferences. The 1998 *Radio and Television Programming Market Research Report* found women enjoy a wide range of genres including news, current affairs, drama, comedy and documentary programmes

This study also found a range of differences in the television viewing preferences of men and women. In terms of *genre*, the differences did not appear to be pronounced - men had a preference for sport, women for magazine style shows and award programmes. Both genders enjoyed news and current affairs, documentary, comedy, drama and variety programming

A greater difference emerged in terms of *content*, particularly with regard to documentary and drama programmes. The research indicated, for example, that women are greater supporters of New Zealand drama than men, have a greater preference for "soaps" and for documentaries "on subjects which pertain to people and their lives".

Research commissioned in 1999, *Literature Review: Women's Television Viewing Preferences*, found that women enjoy fictional and entertainment oriented television, particularly when the focus is on "a strong narrative, characterisation, a developing plot and an emphasis on the relationships between characters". This study also found realism is important to women, meaning documentaries are a popular programme choice.

In order to add further to our understanding, it is appropriate to conduct additional research using different methodologies. By using an independent quantitative measure, i.e. ratings data, we may gain further insight into women's viewing behaviour and will be able to compare the programme preferences found in the previous research to actual viewing levels.

Hence this study uses ratings data to consider women's television viewing behaviour with regard to local and international programmes and to compare this data to the findings of the two research projects identified above.

3. Objectives

The purpose of this project is to:

- a) identify women's viewing behaviour with regard to local programmes, including those of a type not currently funded by NZ On Air, but which are funded by the broadcasters.
- b) identify women's viewing behaviour with regard to international programmes, including those of a type not currently made locally.
- c) identify women's viewing behaviour with regard to a selection of drama, documentary and information programmes (primarily locally made)

This data will provide an indication of how well both NZ On Air and the local market are providing for the interests of women and will assist with NZ On Air's funding policies and strategic position in providing for the interests of women

4. Methodology

In order to answer objective (a) the ratings data for 1998's top New Zealand programmes was collected.

In order to answer objective (b) the ratings data for 1998's overall top programmes was collected.

In order to answer objective (c) the ratings data for the following programmes was collected:

A range of recent New Zealand documentary programmes and series as follows:

- McCormick
- Country Calendar
- Epitaph
- Popstars
- Inside New Zealand 1998 and 1999 (to September 1999)
- Documentary New Zealand 1998 (includes The New Zealand Wars) and 1999 (to September 1999)

A range of recent drama/comedy programmes and series, primarily of New Zealand origin, as follows:

- Shortland Street
- Duggan
- Tiger Country
- The Chosen
- The Topp Twins
- McPhail and Gadsby
- Market Forces
- Real Women (not a New Zealand made programme)

- Greenstone
- Jackson's Wharf
- Lawless
- Pio

A selection of recent New Zealand information programmes as follows:

- 5.30 With Jude
- Backchat
- 60 Minutes (current affairs)
- Fair Go
- Maggie's Garden Show
- Target
- Young Entertainers (not an information programme but included as an example of a family show, with possible appeal to a range of ages)
- My House, My Castle

For these programmes, data was taken from 1998 and 1999 (up to September 1999).

In addition, data on women's viewing patterns was collected in order to provide background information on when women watch television and how much television they watch.

5. Criteria

Because women do not form a homogenous group it is important to clarify the ways in which various groups of women may have different or similar television viewing behaviour. The study thus considered the variables of age, ethnic origin and socio-economic grouping and compared this to the general category of all women 20+ and a control group of all people 20+. Any difference between the control group and all women 20+ will be the result of gender. However, because women are also in this control group any gender difference will be underrepresented.

The lower age boundary of 20 was selected to provide a fit with the *Radio and Television Programming Market Research Report*.

The demographic groups selected, the sample size and the population size they approximately represent are as follows:

| Demographic Group | Sample Size | Population |
|--|--------------------|-------------------|
| Females 20-34 | 117 | 459,000 |
| Females 35-50 | 116 | 366,000 |
| Females 50+ | 156 | 482,000 |
| Females 20+ - European | 334 | 1,061,000 |
| Females 20+ - Maori | 33 | 147,000 |
| Females 20+ - all other ethnic origins | 22 | 98,000 |
| Females 20+ - socios 1 + 2 | 126 | 388,000 |
| Females 20+ - socios 3 + 4 | 172 | 576,000 |
| Females 20+ - socios 5 + 6 | 40 | 156,000 |
| Females 20+ | 391 | 1,307,000 |
| General audience 20+ | 716 | 2,523,000 |

Notes on criteria:

a) Demographics are established by AC Nielsen through the use of a questionnaire. The ethnic groups provided as options in the questionnaire are:

- European
- Maori
- Pacific Islander
- Chinese/Asian
- Other

The category of 'other ethnic origins' used in this report incorporates the last three groups from AC Nielsen's survey. In other words it includes Pacific Islanders, Chinese and other Asians and those that do not fall into one of the four specific AC Nielsen ethnic groupings.

b) Due to the relatively small sample size of 'Maori' and those of 'Other Ethnic Origins', this information should be treated with caution.

- c) The socio-economic groups are defined by AC Nielsen as follows:
- Level 1** - Higher professionals and senior government officials (eg doctors, lawyers, school teachers, MP's)
 - Level 2** - Managerial workers, executives and lower professionals (eg general managers, managing directors, registered nurses, computer programmers)
 - Level 3** - Clerical, self-employed, higher tradespeople and middle management (eg secretaries/typists, builders, electricians, bank officers, sales representatives)
 - Level 4** - Other skilled tradespeople (eg bricklayers, butchers, carpenters, panel beaters, plasterers, printers)
 - Level 5** - Semi-skilled workers (eg forklift truck operators, miners, sewing machinists)
 - Level 6** - Unskilled workers (labourers, manual workers)

6. Glossary

The following is a list of the main genres referred to in the report and a definition where appropriate:

- a) News
- b) Current affairs
- c) Drama
- d) Comedy
- e) Information Programmes
 - Programmes with the primary aim of informing the viewer albeit in an entertaining way.
 - Examples includes Maggies Garden Show, Fair Go, Corbans Taste New Zealand, Crimescene.
- f) Reality Programme
 - Documentary-type programmes based on actual video footage with the primary purpose being entertainment. Generally very commercially oriented.
 - Examples include Middlemore, Police Stop, When Animals Attack, Neighbours From Hell.
- g) Entertainment series
 - Series of a half hour format for which the primary purpose is entertainment, often with a documentary element, or game/challenge element involved.
 - Examples include Aprils Angels, Chef For A Night, Tux Wonder Dogs, Telebingo.
- h) Event specials
 - Programme specials based on a particular event.
 - Examples include The Big Jump, Miss Universe.
- i) Stand Alone Documentaries
 - One-off documentary 'specials' that are generally at the tabloid end of the spectrum.
 - Examples include Monica Lewinsky - Behind the Myth, Painted Babies, Dying To Be Thin.
- j) Documentary series and strands
 - All documentary series and strands, which may range from the lighter ½ hr format to indepth series.
 - Examples include McCormick, Documentary New Zealand, Inside New Zealand.

It is acknowledged that some programmes could reasonably fall into more than one category. These definitions are simply for ease of description in the report.

7. Results

Viewing Patterns

7.1 Women's Viewing Patterns - all women 20+

Most television watching by women occurs in primetime, that is the hours between 6pm and 10pm. At the weekends, late afternoon television builds gradually into primetime, while during the week, viewing levels leap up more sharply between 5.30pm and 6pm.

On average, during the week, between 1 and 12 % of all women 20+ are watching television during the day, whereas in primetime the figure is between 45-50 %.

7.2 Gender and viewing patterns - comparing all women 20+ to all people 20+

The data indicates that in general women are a little more likely to be watching television during the week than men, particularly within primetime. This difference is not large and virtually disappears at the weekend.

7.3 Ethnicity and viewing patterns

While European women's viewing patterns closely match the control groups (all women 20+ and all people 20+) Maori women appear to be slightly more likely to watch daytime television and slightly less likely to watch primetime television. This pattern is evident both during the week and at the weekend. This trend is slightly more pronounced amongst women of other ethnic origins.

7.4 Socio-economic grouping and viewing patterns

Women from socio-economic groups 1 & 2 tend to be less likely to watch television than the average women (average being all women 20+) during the hours leading up to primetime and particularly in primetime itself. Women from the lower socio-economic groups (that is groups 5-6) are slightly more likely to be watching in the hours leading up to primetime during the week.

7.5 Age and viewing patterns

Young women seem to be less likely to watch television than the average woman (average being all women 20+) with lower viewing levels during primetime and also on weekend afternoons. Similarly women aged 35-49 have slightly lower than average viewing levels particularly during primetime and weekend afternoons. Older women, those 50 and over are significantly more likely to watch television and interestingly this is mainly during primetime hours.

8 Results

1998's Top New Zealand Programmes and Top Overall Programmes

8.1 Women As A Diverse Group

The first revelation obtained from the ratings data is that significant differences in television viewing behaviour exist between certain groups of women. It is therefore useful to first indicate where these differences occur before proceeding to the main findings of the study.

As a group (all females 20+), women's television viewing behaviour is representative of European women, women aged 35 and over and women from socio-economic groups 1-4.

However, it is not always an accurate representation of the television viewing behaviour of Maori women, women of other ethnic origins, nor for women aged 20-34 or those from socio-economic groups 5-6. These women have different viewing behaviour, particularly when a full range of programmes is considered, rather than solely New Zealand material.

In order to reflect these differences the results that follow are arranged according to age, ethnicity and socio-economic group.

8.2 Women's Top Programmes - all women 20+

Overall

When choosing from both New Zealand and overseas television fare, women's top programmes include documentaries, news, information and sports. From these genres they predominantly watch New Zealand material. In addition they support a range of drama and entertainment programmes originating from both New Zealand and overseas (primarily Australia and the UK). Examples include *Blue Heelers*, *Bramwell* and *Neighbours From Hell*. Many of women's top programmes have themes related to home and lifestyle or people and their lives, including family and other relationships.

New Zealand only

When looking at the top New Zealand programmes it is again documentary, news, information and sports programmes that women watch in greatest numbers. In addition a range of entertainment programmes including *Tux Wonder Dogs* and *Telebingo* rate highly for women. Only one comedy appears in their 1998 New Zealand top 30 - *Market Forces*. There are no dramas. This may be because different women have different tastes in drama programmes, for example, *Duggan* tends to attract strong viewing levels among older women and those from socio 1-2 while younger women are more likely to watch *Shortland Street*.

8.3 Gender and Top Programmes - comparing all women 20+ to all people 20+

Women's television viewing behaviour varies subtly but consistently from men's. Women show stronger support for documentaries and are less likely to watch sports programmes. Gardening, food and quiz shows like *Telebingo* attract more female viewers than male, as do drama and comedy programmes. Men and women seem to have different tastes with regard to some drama and comedy programmes, although there are many such shows that receive strong ratings from both genders. Men are higher viewers of certain feature films while women are more likely to watch long-run serials - *Coronation Street* and *Shortland Street* being popular with older and younger viewers respectively.

However, the ratings clearly indicate that women's top programmes are also likely to be watched by large numbers of men. Therefore, when considering what constitutes "a programme of interest to women" it is essential that the focus does not become "programmes of interest only to women".

8.4 Ethnicity and Top Programmes

8.4.1 European women's viewing behaviour

Overall

European women's viewing top programme list closely resembles that of all women 20+ as outlined in 8.2 above.

New Zealand only

European women's viewing top programme list closely resembles that of all women 20+ as outlined in 8.2 above.

8.4.2 Maori women's viewing preferences

Overall

When choosing from both New Zealand and overseas fare, feature films rate strongly amongst Maori women viewers along with music oriented programmes such as *An Audience With The Bee Gees*. Documentary and sports programmes, predominantly of New Zealand origin, are also well watched, however there are no news or current affairs programmes featured in their top 30 list. A small selection of entertainment and one-off documentary programmes originating from both New Zealand and overseas, such as *Chef for a Night*, also rate highly with this group.

It is interesting to note that there fewer New Zealand programmes amongst Maori women's overall top 30 than compared to the general female audience. This indicates that current local programming is either of less appeal to Maori women or that there are divergent interests amongst the group.

New Zealand only

When watching New Zealand material documentaries, sports, and information programmes feature strongly. News also attracts viewership, but current affairs programmes do not rate quite so well with only *60 Minutes* appearing in the top 30. Entertainment programmes are well watched with examples including *Telebingo* and

Guess Who's Coming to Dinner. Maori women seem to have an interest in seeing Maori representation and stories on screen, with the top two New Zealand programme slots of 1998 being taken by *The New Zealand Wars* pts 2 and 5. All five episodes feature amongst their top 30 New Zealand programmes.

8.4.4 Women of other ethnic origins viewing behaviour

Overall

The television viewing behaviour of women of other ethnic origins least resembles that of the general female category. When choosing from both New Zealand and overseas fare, this group shows a very strong tendency to watch feature films on television with relatively little viewing support for the current range of New Zealand programmes. In addition to movies, their top programme list also includes a range of entertainment, reality and one-off documentary programmes (mainly American) such as *When Good Pets Go Bad* and *Dying To Be Thin*.

New Zealand only

While women of other ethnic origins do watch the sorts of documentaries, news and information programmes currently on offer, they are less likely to do so than either Maori or European women. Current affairs programmes obtain only mediocre ratings with none appearing amongst their top 30 programmes. In fact, many of the top New Zealand programmes for this group are not remarkably high rating, the majority achieving less than 20%. Again this may indicate that current local programming is either not of great appeal or that divergent tastes are operating in the group.

Sports programmes rate highly along with event specials such as *The Hero Parade* and *Carols by Candlelight*. Reality programmes such as *Middlemore* and entertainment shows such as *Garage Sale* also rate well. Two New Zealand dramas appear in the top 30 - *Shortland Street* and *Queenie and Pete*.

Given the relatively high viewing levels of *The Gospel According To David* and *Protecting the Border* it seems that women of other ethnic origins have an interest in seeing themselves reflected on screen

8.5 Socio-economic Status and Top Programmes

8.5.1 Socios 1-2 and 3-4

Overall

Socios 1-2 and socios 3-4 have similar viewing behaviour to the category of all women 20+. Documentaries, news, information and sport (primarily of New Zealand origin) all rate very well. However, socios 1-2 seem to have a particularly strong interest in drama programmes (rather than movies), mostly British but with New Zealand's *Duggan* also appearing in the top 30. The British royal family may also hold interest with two royal event specials attracting large ratings.

New Zealand only

Similar to the general category of all women 20+, women from socio-economic groups 1-2 rate documentary, news, current affairs and information shows as their top New

Zealand programmes. Also on the list are major sporting events, drama and comedy and some variety programming (such as *This is Your Life*).

Women from socio-economic groups 3-4 have similar viewing behaviour to socios 1-2, although programme order may vary. However as noted above socios 1-2 seem to have a particular interest in drama and hence *Duggan* rated amongst their top New Zealand programmes but did not achieve this for socios 3-4. Socios 3-4 are slightly more entertainment oriented with their top programme list including *Tux Wonder Dogs* and *Telebingo*

8.5.2 Socios 5-6

Overall

More inclined to be TV2 watchers, reality-type programmes receive higher ratings for this group than the current affairs and information genres. Feature films are high on their list of top programmes along with sports and entertainment. *Shortland Street* rates amongst the top 10 and music oriented specials such as *Miami Spice* are well watched. A number of documentaries also appear in the top 30 list.

New Zealand only

Sports programmes feature strongly and there is also a range of entertainment, documentary and information programmes. *Shortland Street* is the only drama to appear, holding the #4 position. Event specials are well watched and the appearance of *Crimescene*, *An Inside Story*, and *Police* amongst their top programmes perhaps indicate an interest in the themes of crime and justice.

8.6. Age and Top Programmes

8.6.1 20-34 Years

Overall

The television viewing behaviour of young women bears slim resemblance to that of the general female category (all women 20+). This group rates feature films on television very highly (although not to the same extent as women from other ethnic origins) and are strong supporters of *Shortland Street*. There is a tendency to watch American comedies (including sitcoms, drama/comedies and improvisation), and a mix of reality and entertainment oriented programme, such as *Middlemore*, *When Animals Attack* and *Who Dares Wins*. One-off music programmes complete the diet.

New Zealand only

Like women of other ethnic origins, most of the top New Zealand programmes for women aged 20-34 do not rate remarkably highly, the majority achieving less than 20%, indicating that current local programme choices are not of consistent or high interest. Despite this, it is important to remember that this group does tune in to New Zealand programmes that are more aimed at their interests. *Lawless* and *Popstars*, for example, are likely to be amongst their overall top programmes in 1999. *Jackson's Wharf* started on television in 1999 with moderate ratings and may well build its audience further.

When watching New Zealand material this group favours reality or entertainment type programmes. Drama, notably *Shortland Street*, and some documentaries also attract strong viewing levels. The occasional sports event, including netball, rates well but notably absent is news, current affairs and most information programmes (remembering these are generally TV1 shows, a channel not often watched by this group).

8.6.2 35-49 and 50 +

Overall

These groups tend to watch many of the same sorts of programmes, which in turn bear strong resemblance to the viewing behaviour of all women 20+. There are some differences however, for example women aged 35-49 are less likely to watch *Holmes* than women 50+ and are also more likely to change channels from TV One to watch certain feature films and the occasional other programme on TV2. For women 50+ feature films do not attract high viewing levels, instead British or Australian drama series on TV1 do particularly well with British comedy also being popular. Some drama series such as *Bramwell* and *Coronation Street* achieve strong ratings with both groups. Women 50+ are also stronger supporters of the New Zealand comedy *Market Forces*.

As women 50+ watch considerably more television than other groups, programme ratings for this group tend to be up to 20 rating points higher than for other women.

New Zealand only

Again, women 35-49 and 50+ tend to watch many of the same sorts of programmes, which in turn bear strong resemblance to the viewing behaviour of all women 20+. There are some differences of course, women aged 35-49 do not rate *Holmes* amongst their top programmes, nor *Market Forces*. Instead *Queenie and Pete* was the most watched New Zealand drama/comedy for this age group. Older women, 50+, are strong viewers of *Country Calendar* which does not appear in the top programmes of all women 20+. Other documentary choices also vary slightly for these age ranges. For example, only 1 episode of *The New Zealand Wars* appears in the top 30 for women 50+ compared to 4 episodes for women aged 35-49. Reversely *Ten Pound Poms* was well watched by women 50+ but did not gained strong viewership from women aged 35-49.

9. Results

9.1 A Selection of Documentary Programmes - All New Zealand-Made

9.1.1 Women and Documentary Programmes - all women 20+

New Zealand documentary programmes of many varieties are well supported by female viewers. 20 + female ratings for the documentary series studied (not including the *Documentary New Zealand* and *Inside New Zealand* strands) ranged between 18% and 22%. The *Documentary New Zealand* ratings varied between 13% and 31% with an average of 23% over the 1998 and 1999 years. The *Inside New Zealand* ratings were between 4% and 19% with an average of 11%, again over the two year period. *Inside New Zealand's* ratings no doubt reflect the poorer rating performance of TV3 during this time period.

Given that a strong rating point for this group would be in the range of 18-22, overall these are strong figures.

The most watched documentary series was a tie of 22 % between *Country Calendar* (1999) and *McCormick* (1998) but the highest individual ratings came from *Documentary New Zealand 1998*:

Famous Five - The Lawson Quins (31%)

Location, Location (Pt 2 - 30%)

Rural Dreaming (30%)

Love Thy Neighbour (28%)

Private Lives of Little People (28%)

Location, Location (Pt 2 - 28%)

9.1.2 Gender and Documentary Programmes - comparing all women 20+ to all people 20+

For the majority of the programmes studied there was a higher rating level for the female audience than for the general audience (although this margin was often very small) indicating more women were watching than men. The exceptions to this tended to be programmes that might arguably have specific male appeal, such as *Blokes 'n' Sheds* (DNZ 99), *The Great Kiwi Pub* (DNZ 99) and *Your Home, Your Castle* (INZ 98).

9.1.3 Ethnicity and Documentary Programmes

The documentaries programmes studied that appeared on TV One, including *Documentary New Zealand*, achieved progressively lower ratings amongst Maori women and women of other ethnic origins in comparison to European women. Nevertheless, in their own right many of the documentaries rated well for these groups.

Country Calendar (1999) was the clear series winner for European women at 23%, *Documentary New Zealand* obtained an average of 24% over 1998 and 1999 and *Inside New Zealand* 11% over the same time period. For European women, the highest rating

documentaries of those were all from *Documentary New Zealand 1998* as outlined in 2.1 for all women 20+:

- *The Famous Five, the Lawson Quins* (32%)
- *Rural Dreaming* (32%)
- *Location Location* (Pt 2 - 32%)
- *The Private Lives of Little People* (32%)
- *Love Thy Neighbour* (31%)

With most documentaries not rating as well amongst Maori women, *Popstars*, was the most watched of the series with a rating of 19%, *Documentary New Zealand (DNZ)* had an average of 18% and *Inside New Zealand (INZ)* 10%. *DNZ 1999* again achieved the individual highs:

- *The New Zealand Wars* (Pt 2 - 37%)
- *The New Zealand Wars* (Pt 5 - 36%)
- *On The Road* (32%)
- *The Famous Five, the Lawson Quins* (29%)
- *Location, Location* (28%)

For women of other ethnic origins, documentaries did not rate so well, with many obtaining less than 10%. Of the series, *Popstars* was again the most watched with 15%. Despite the difference in channel performance TV3's *INZ* and TV One's *DNZ* achieved the same average rating of 8% for women of other ethnic origins. The highest rating programmes from these strands were:

- *The Gospel According to Lange - INZ 1999* (30%)
- *Facing Infertility - DNZ 1999* (24%)
- *Building Dreams - INZ 1999* (23%)
- *Protecting the Border - INZ 1998* (18%)
- *The House of Hope - INZ 1999* (18%)

Ethnicity had the greatest impact on viewing trends, in that a programme that rated particularly well with one ethnic group may have had the reverse response within another ethnic group.

9.1.4 Socio-economic Status and Documentary Programmes

Women of all socio-economic status rate documentaries highly. This variable generally had the least impact on viewership, and seemed to influence viewing levels in the least consistent manner.

Overall, TV One documentaries attracted higher numbers of socios 1-4, while *Inside New Zealand* on TV3 had roughly equal viewership amongst all socio groups.

The highest rating series of those studied for socios was 1-2 *Country Calendar* (1998 - 22%), while *Documentary New Zealand* achieved an average of 23% and *Inside New Zealand* 12%. Like all women 20+, the overall rating highs came from *DNZ 1998*:

- Location, Location* (Pt 2 - 35%)
- Famous Five- the Lawson Quins* (33%)
- Love Thy Neighbour* (32%)

Rural Dreaming (31%)
NZ Wars (Pt 1 - 31%)
Girl Talk (31%)

For socios 3-4 all the documentary series obtained 23%, *DNZ* had an average of 24% and *INZ* 10%. Again, documentaries from *DNZ 1998* achieved the highest individual ratings:

Famous Five- the Lawson Quins (33%)
Location, Location (Pt 2 - 32%)
Rural Dreaming (31%)
Private Lives of Little People (31%)
Boys To Men (30%)

Along with *Popstars* on TV2 (23%), only several *Inside New Zealand* programmes stood out as having greater viewing levels for women from socios 5-6. These programmes were all from TV3 as follows:

- *Teens - Driving Parents Crazy*
- *Six Days In A Leaky Boat*
- *My Name Is Jane*
- *Dog Squad*
- *An Inside Story*

These were not necessarily the top rating programmes for this group, but showed significantly greater appeal to socios 5-6. Those with the highest ratings were:

Rural Dreaming (26%)
On The Road (26%)
Love Thy Neighbour (25%)
Famous Five- the Lawson Quins (24%)
Location, Location (Pt1 - 23%)
Teens - Driving Parents Crazy (23%)

Although the majority of the programmes are the same as for socios 1-4, note that the actual rating figures are significantly lower. *DNZ* averaged 18% and *INZ* 11% for this group.

9.1.5 Age and Documentary Programmes

This had the most impact on documentary viewing levels, partly attributable to older women watching a considerable amount of television - largely on TV One.

Young women aged 20-34 rated *Popstars* highly (27%) but other documentary series (which were all on TV One) did not fare particularly well. This group showed moderate and roughly equal interest in the two documentary strands on TV One (*DNZ* average rating - 11%) and TV3 (*INZ* average rating - 12%). The top rating of these were:

Nude Zealand - INZ 1999 (25%)
Triplets - INZ 1998 (19%)
An Inside Story - INZ 1999 (19%)

Love Thy Neighbour - DNZ 1998 (19%)

As might be expected women aged 35-49 tended to fall into the middle ground between younger and older women. All the documentary series analysed attracted steady ratings of between 15-18% for this group, with *Popstars* rating just as well as the series on TV One. DNZ had an average rating of 20% and INZ of 12%. The highest individual rating programmes were all from *Documentary New Zealand*:

Location Location - DNZ 1998 (Pts 1 + 2- 30%)

Famous Five - The Lawson Quins - DNZ 1998 (29%)

Girl Talk - DNZ 1998 (28%)

Age 14 in New Zealand - DNZ 1999 (28%)

Crump - A Wand'rin' Star - DNZ 1999 (28%)

When Age Doesn't Matter - DNZ 1999 (28%)

All TV One documentary programmes attracted large numbers of women over 50, each rating over 20% and reaching as high as almost 50%. TV2 and TV3 did not fare so well, achieving ratings of between 3 and 15% for 50+ women. DNZ averaged 36% and INZ 10%. Their top rating documentaries were again all from *Documentary New Zealand 1998*:

Famous Five - the Lawson Quins (49%)

Rural Dreaming (49%)

Private Lives of Little People (46%)

Boys To Men (46%)

Ten Pound Poms (44%)

9.2 A Selection of Drama and Comedy Programmes - Primarily New Zealand-Made

9.2.1 Women and Drama/Comedy Programmes - all women 20+

Like documentaries, many women watch a variety of drama/comedy programmes.

Real Women (which is the only drama studied that is not a New Zealand programme), *Market Forces 1998* and *Duggan 1999* achieved the highest ratings of the programmes studied with 28%, 23% and 21% respectively.

9.2.2 Gender and Drama/Comedy Programmes - comparing all women 20+ to all people 20+

Several of the programmes analysed showed higher rating levels for the female 20+ audience than for the equivalent general audience. This indicates more women watched these programmes than men.

Real Women and *Shortland Street* both showed the greatest gender difference. Together these programmes encapsulate the findings of the NZ On Air commissioned *Literature Review: Women's Television Viewing Preferences*. This study noted that women like to see strong female characters on screen, enjoy well-developed plotlines and have a preference for long-run serial drama.

9.2.3 Ethnicity and Drama/Comedy Programmes

Women of all ethnicities watch some New Zealand drama and comedy programmes. However, ethnicity had a serious impact on which programmes were preferred.

European women favoured programmes on TV One, which mainly attracted viewing levels of more than 20%. Maori women watched TV2 and TV3 programmes such as *Tiger Country* (14%) and *Shortland Street* (1999-21%) but also tuned in to some TV One programmes such as *Greenstone* (15%) and *Market Forces* (1999-14%).

Women of other ethnic origins were strong supporters of *Shortland Street* (1999-18%) and *Jackson's Wharf* (16%) and also showed a greater tendency to watch *Pio* than the other ethnic groups.

9.2.4 Socio-economic Status and Drama/Comedy Programmes

Most of the programmes looked at had relatively broad appeal across the socio-economic groups. Overall socios 3-4 seemed to be the largest drama and comedy viewing group with *Market Forces* (1998-25%) and *Real Women* (27%) being their most watched shows.

Socios 1-2 showed strong ratings for *Duggan* (1998-29%) and *Real Women* (37%), while *Shortland Street* was by far the highest rating programme amongst socios 5-6 with 27%.

9.2.5 Age and Drama/Comedy Programmes

Older women are strong supporters of drama and comedy programmes on TVOne, with all programmes studied on this channel achieving ratings of more than 30% for this age group.

While most of the drama/comedy programmes attracted only moderate numbers of younger women, they did watch *Shortland Street* (1999-32%), *Real Women* (20%), *Jacksons Wharf* (15%) and *Lawless* (22%) in large numbers.

Women aged 35-49 were the most consistent across the range of programmes and channels, generally showing moderate to good support. *Real Women*, however, stood out as being their most watched drama programme (27%) followed a considerable way behind by *Shortland Street* (1998-16%).

9.3 A Selection of Information Programmes - All New Zealand-Made.

While not strictly an information programme, *Young Entertainers* was included in this range of programmes to provide an example of a family entertainment show. Perhaps surprisingly it achieved only moderate ratings amongst the groups of women - figures varied between 10 and 15%.

Also note that *60 Minutes*, while more accurately a current affairs programme, has been included in this range of programmes.

9.3.1 Women and Information Programmes - all women 20+

Like documentaries and drama/comedy, many women watch a variety of New Zealand information programmes.

Fair Go (1998-29%), *Sixty Minutes* (1998-24%) and *Maggies Garden Show* (1998-25%) were the top-rating programmes for all women 20+. *Target* (16%) did well for the poorer performing TV3 and *My Home, My Castle* (18%) achieved solid ratings on TV2.

9.3.2 Gender and Information Programmes - comparing all women 20+ to all people 20+

Several of the programmes analysed showed higher rating levels for the female 20+ audience than for the equivalent general audience. This indicates women were somewhat more likely to watch these programmes than men.

9.3.3 Ethnicity and Information Programmes

Similar to what we have seen before, European women seemed most likely to watch the information programmes studied, followed by Maori women and then women of other ethnic origins. Viewing levels for European women varied considerably from 3-29%, less so for the other groups for whom the ratings hovered at lower levels.

Fair Go had the broadest appeal being the highest rating information programme of those studied for all three ethnic groups (European: 1998-31%, Maori: 1999-24%, women of other ethnic origins: 1998-12%).

9.3.4 Socio-economic Status and Information Programmes

With relatively little difference between socios 1-2 and socios 3-4, socios 5-6 were somewhat less likely to watch the information programmes analysed. *Fair Go* had the broadest appeal and was the most watched information programme for all the socio-economic groups (24-31%).

9.3.5 Age and Information Programmes

Age had a strong impact on which information programmes were viewed. Information programmes on TVOne achieved fairly low ratings of up to 11% amongst young women, moderate ratings of up to 22% amongst 35-49 year olds and strong ratings of up to 51% for women over 50.

Information programmes on TV2 (*My Home, My Castle*) and TV3 (*Target*) continued to receive moderate ratings from 35-49 year old women. However, there was much stronger support amongst younger viewers with ratings of up to 29% and much lower support from older viewers with a top rating of only 16%.

It is worth noting that because older women watch considerably more television, particularly New Zealand television, than younger women, a moderate-high rating for women aged 20-34 may well equate to a low rating for the older age group.

10. Results

Other Findings

10.1 Channel and viewing preferences

Women's viewing preferences are generally consistent with their channel preference. It is not easy to delineate which attracts viewers - the channel or the programme although in practical terms the two are synonymous. When guided by the overall top programmes list, TV One emerges as the preferred channel for European women, women aged 35 plus, and socios 1-4. TV2 attracts strong viewership from younger women, women of other ethnic origins and socios 5-6. Maori women primarily watch TV One and TV2 but will also tune in to TV3 for a range of programmes. While TV3 doesn't feature strongly in most groups overall top 30, those women who favour TV2 are more likely to turn to TV3 than those who favour TVOne.

One programme that does indicate that even the most channel-loyal women will seek out individual programmes they wish to view is *Real Women*. This is a British drama about a disparate group of old school friends getting together for a marriage. *Real Women* attracted a 20% rating amongst females aged 20-34, a very strong result considering this group are typically TV2 watchers and this programme screened on TV One in the traditional *Montana Sunday Theatre* drama slot.

10.2 How do the results of this study compare to the previous research?

When focusing on women as a single group, (ie all women 20+) viewing behaviour in the present study show considerable similarity to the findings of previous research work, including the *Radio and Television Programming Market Research Report* (1998) and *Literature Review: Women's Television Viewing Preferences* (1999), both commissioned by NZ On Air.

For example, both of these previous studies concluded that women as an overall group:

- enjoy documentaries, particularly those that pertain to people and their lives.
- have a strong interest in news and current affairs programmes
- enjoy some sports programmes (although not as much as men do).
- enjoy some drama and comedy programmes. In particular women like soaps (long-run serial dramas), programmes that strongly feature women, have well developed storylines and focus on personal relationships.

These findings correspond to the viewing behaviour outlined in this report

Both studies acknowledge that women do not form a homogenous group but are differentiated according to a range of variables including age and ethnicity.

The *Radio and Television Programming Report* pointed to the importance of age in determining women's television preferences. For example, it noted that women aged

20-35 particularly enjoy US sitcoms and prefer 'reality' type documentary series whereas women over 35 enjoy English comedy, drama and serials and historical drama. Again ratings information seen in this report reflect these findings.

The *Radio and Television Programming Report* also found different preferences according to ethnicity. It noted, for example, that Maori enjoy New Zealand programmes which provide Maori representation on screen. This concurs with the ratings data which shows strong ratings amongst Maori women for such New Zealand programmes as *The New Zealand Wars*.

11. Appendices

Appendix I

Viewing Patterns 1 x 1 chart average weekday; and
1 x 1 chart average weekend for women 20+ from the following groups:

- European women
- Maori women
- Women of other ethnic origins
- Women from socio-economic groups 1-2
- Women from socio-economic groups 3-4
- Women from socio-economic groups 5-6
- Women aged 20-34
- Women aged 35-49
- Women aged 50+

Charts also show all women 20+ and all people 20+

Appendix II

Top programmes - New Zealand and overseas combined for each of the 11 demographic groups

Appendix III

Top programmes - New Zealand only for each of the 11 demographic groups.

Appendix IV

Average Programme Rating for each of 11 demographic group for the following documentary series:

- McCormick
- Country Calendar
- Epitaph
- Popstars

Appendix V

Average Programme Rating for each of 11 demographic group for *Inside New Zealand* as follows:

- Inside New Zealand 1998 + 1999 - average
- Inside New Zealand 1999 - individual programmes by ethnicity, socio-economic group and age
- Inside New Zealand 1998 - individual programmes by ethnicity, socio-economic group and age

Appendix VI

Average Programme Rating for each of 11 demographic group for *Documentary New Zealand* as follows:

- Documentary New Zealand 1998 and 1999 - average
- Documentary New Zealand 1998 - individual programmes by ethnicity, socio-economic group and age
- Documentary New Zealand 1999 - individual programmes by ethnicity, socio-economic group and age

Appendix VII

Average Programme Rating for each of 11 demographic groups for the following drama/comedy programmes:

- The Chosen
- McPhail and Gadsby
- Tiger Country
- Shortland Street
- Topp Twins
- Pio
- Market Forces
- Duggan
- Greenstone
- Real Women
- Lawless
- Jackson's Wharf

Appendix VIII

Average Programme Rating for each of 11 demographic groups for the following information programmes:

- Fair Go
- 60 Minutes
- My House My Castle
- Target
- Backchat
- 5.30 With Jude
- Young Entertainers
- Maggies Garden Show

Appendix I

Appendix II

Appendix III

Appendix IV

Appendix V

Appendix VI

Appendix VII

Appendix VIII

