

DOCUMENTARY SURVEY

A SURVEY OF 1,000 NEW ZEALANDERS WHO WATCH TELEVISION

JUNE 2013



Executive Summary (i)

Methodology

- Results in this report are based on a telephone survey of 1,000 New Zealanders who watch television. The survey was conducted between 1 May and 2 June 2013.

The definition of a documentary

- Respondents were asked to define a documentary using their own words. Common themes included:
 - Documentaries are ‘non-fiction’ or ‘real-life’.
 - Documentaries build knowledge and are informative.
 - Documentaries should be on an interesting or relevant topic.
 - People often associate documentaries with current issues or events, animals or nature, or history.
- Most people (7 in 10 or higher) think of the following as ‘documentaries’:
 - Kingdom of Plants
 - Inside Child Poverty
 - Beyond the Darklands
 - Country Calendar, and
 - What’s Really In Our Food

Not many (less than 1 in 5) think of the following as documentaries:

- Top Gear
- Campbell Live,
- The GC, and
- Masterchef.



Executive Summary (ii)

Documentary watching

- 90% of respondents say that they watch documentaries.
- The majority (8 in 10) watch documentaries on live broadcast television.
- TV1, TV3, Prime and Maori TV are the main channels associated with NZ documentaries.

Viewing preference

- The majority (three-quarters) prefer one hour long documentaries.
- The population is reasonably evenly split when it comes to preference for series vs. one-offs. 37% prefer a series, 42% prefer one-offs (the rest did not state a view either way).
- The three most commonly requested topics for NZ documentaries are:
 - nature and geography
 - history, and
 - science and technology.

NZ documentaries

- People watch NZ documentaries for a wide range of reasons, including to build knowledge, learn about New Zealand, because of interest in the topic, and because they can relate to them (for example, they know the people or places).
- Most people rate the quality of NZ documentaries as either excellent (13%), very good (54%) or good (29%).
- People who are positive about NZ documentaries often like the way they are made (normally quoting good quality production or presentation). Other positives include the personal relevance to the viewer, the educational quality of the information, and the fact they are ‘true’ and deal with facts.
- Not many quoted anything negative about NZ documentaries, but there are some who mention they can be unbalanced, be ‘average’ in quality, or lack depth.



Executive Summary (iii)

People who do not watch documentaries

- The five most common reasons for not watching documentaries are:
 - the lack of appeal in the subject matter,
 - lack of time,
 - not watching much TV in the first place,
 - have a strong interest in other genres (such as sport or comedy), or
 - because documentaries are perceived as boring or depressing.
- The largest incentive to watch NZ documentaries (among those who do not watch documentaries) would be a more interesting or relevant topic. Some also say they would be drawn towards more contemporary material.

Methodology

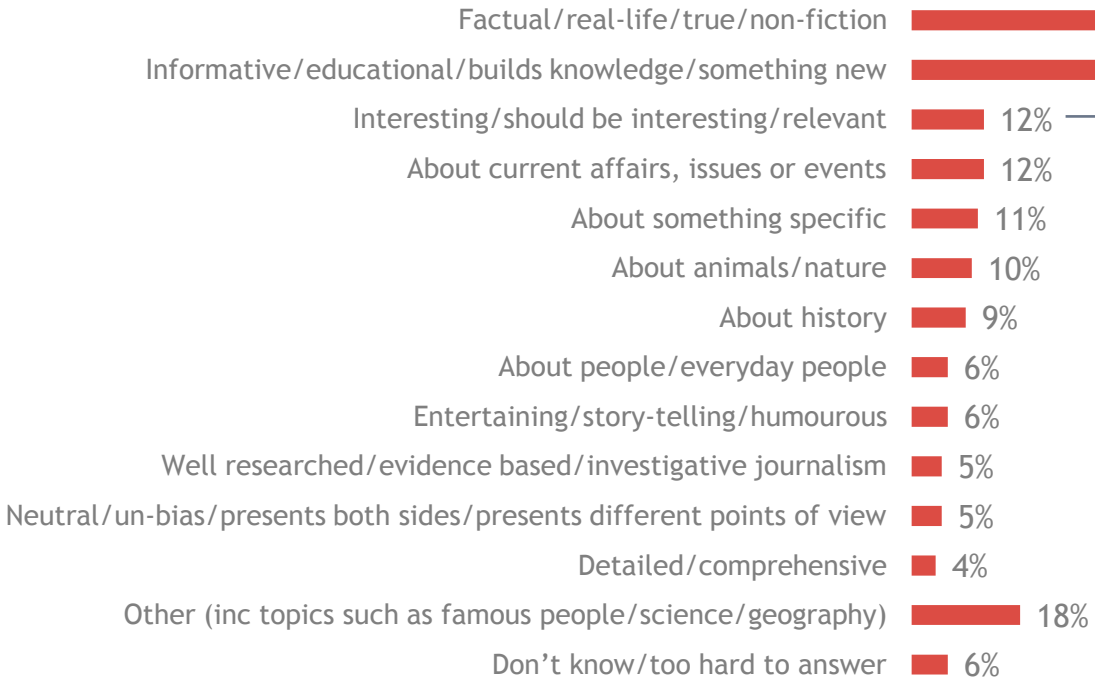
- Results in this report are based on a telephone survey of 1,000 New Zealanders who watch television.
- Those who watch less than five hours a week of television (either on TV or on the Internet) were not included in the survey. Therefore this survey should be considered a 'survey of the television watching public'.
- The maximum margin of error for a survey of 1,000 people is +/- 3.1%.
- The survey was conducted between 1 May and 2 June 2013.

DEFINITION OF A DOCUMENTARY



Respondents were asked to define a documentary using their own words. Common themes included the idea that documentaries should be ‘non-fiction’ or that they should build knowledge. Many also feel documentaries need to be on an interesting or relevant topic. Common topics mentioned include: current issues or events, animals, nature and history. (People often mentioned more than one theme in their definition).

How would you define a documentary?



‘Documentaries should be interesting’ is mentioned more often by older people: 5% for those up to 29, 9% for 30-49, 17% 50-69m and 26% for 70+.

Base: All respondents (n=1002)



How would you define a documentary? Some quotes from respondents

“It’s a factual programme about some aspect of life, it could be about nature, society, politics, cultural, dance, singing or music. It is something that usually has wonderful photography either a voice over, a narrator or a front person like David Attenborough”

“It’s something that everybody will be interested in, that goes in depth without being too scientific, so everyone can understand it. Something that’s humorous with a little bit of feeling and lightness to make it very interesting”

“A programme that was designed to inform the general public. To make us more knowledgeable about things that are going around us”

“A documentary is a fact finding and informative film about a subject. Really any documentary that is interesting to a wide range of people and is usually quite in-depth and covers a wide range of angles”

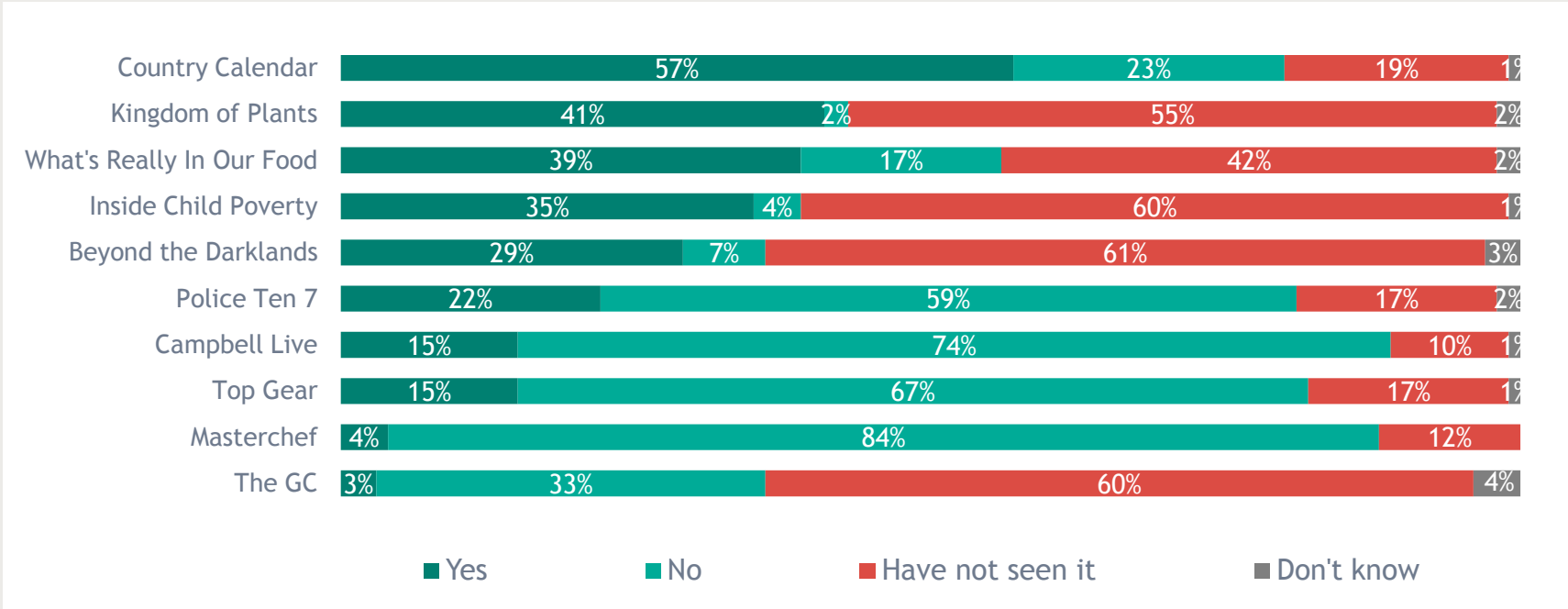
“A documentary is the filming of something that is non-fiction. It is like an article that follows a story, a line or recount of something. It can be sensational or educational, and it tries to be objective”

“A documentary is an article that gives you background and detail about whatever the subject is. So that at the end of the programme you can come up with some sort of decision about what’s involved. So really something that gives you detail as well as entertainment and something that you can learn something from”

Respondents were then asked whether or not specific programmes were ‘documentaries’. Over half of the public agree that Country Calendar is a documentary, whereas only 3% say The GC is a documentary.

[Many were unable to give a view - please refer to the next slide for opinions among those who have watched each programme].

Do you think that the mentioned programme is a documentary?

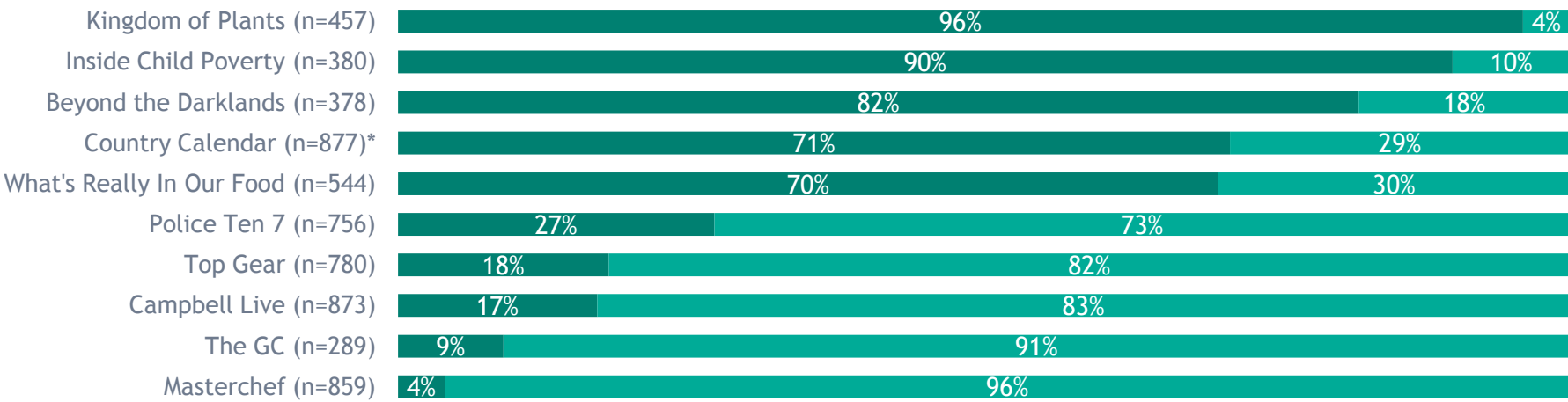


Base: All respondents (n=1002)



Looking only at those who have watched the programme and stated a view...
 Almost all of those who have viewed Kingdom of Plants and Inside Child Poverty think they are documentaries. Whereas not many viewers think Top Gear, Campbell Live, The GC, or Masterchef are documentaries.

Do you think that the mentioned programme is a documentary? (Among those who state a view)



* Older people are more likely to define Country Calendar as a documentary (83% of those aged 70+, compared with 55% of those aged up to 29 and 74% of those aged 30-69).

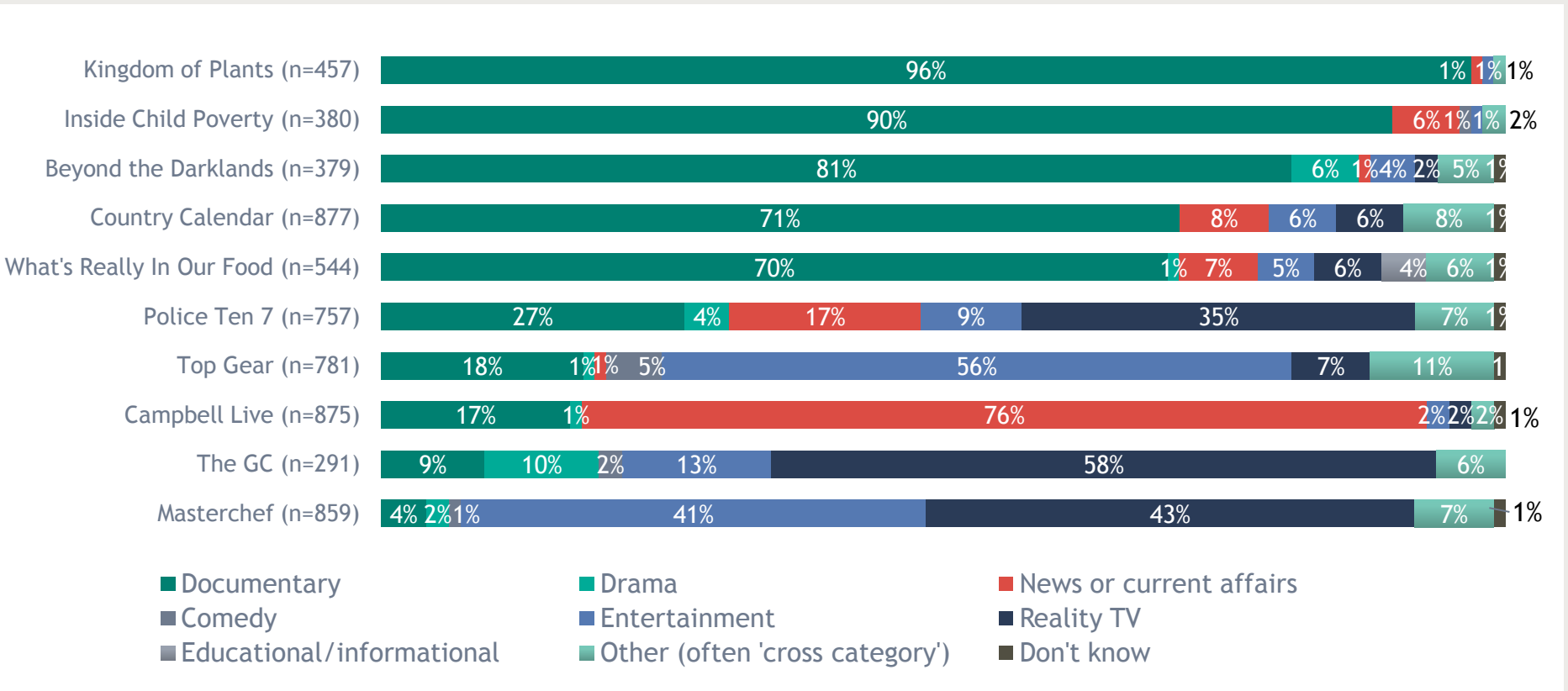
■ Yes ■ No

Base: All respondents who are aware of these programmes (varies)



Continuing to look at those who have watched the programme and stated a view... When asked for a definition, Top Gear is mainly thought of as 'entertainment', whereas The GC is mainly thought of as 'Reality TV'. There is no consensus about the definition of Police Ten 7 or MasterChef (the latter is mainly perceived as 'entertainment' or 'reality TV').

So, how would you define these programmes?



Base: Respondents who have seen the programme and have an opinion on its definition (varies)

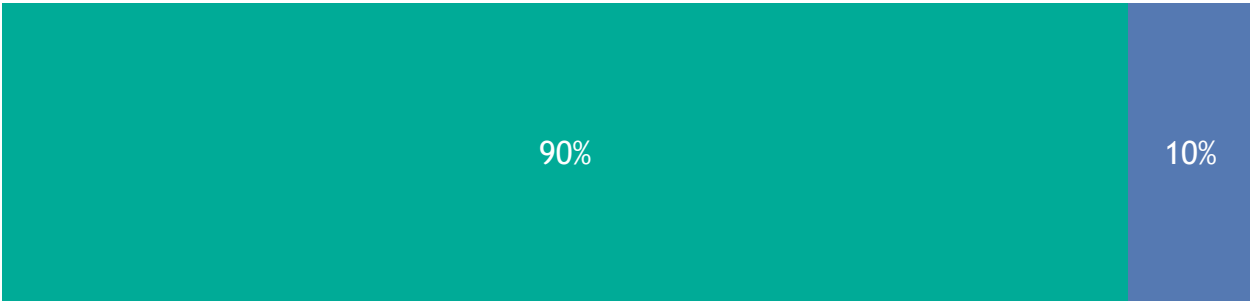


DOCUMENTARY WATCHING



Nine in ten people say they watch documentaries (this varies within the population, please refer to the next slide for more details).

Do you watch documentaries?



■ Yes ■ No

Base: All respondents (n=1002)



Differences in documentary watching by demographic

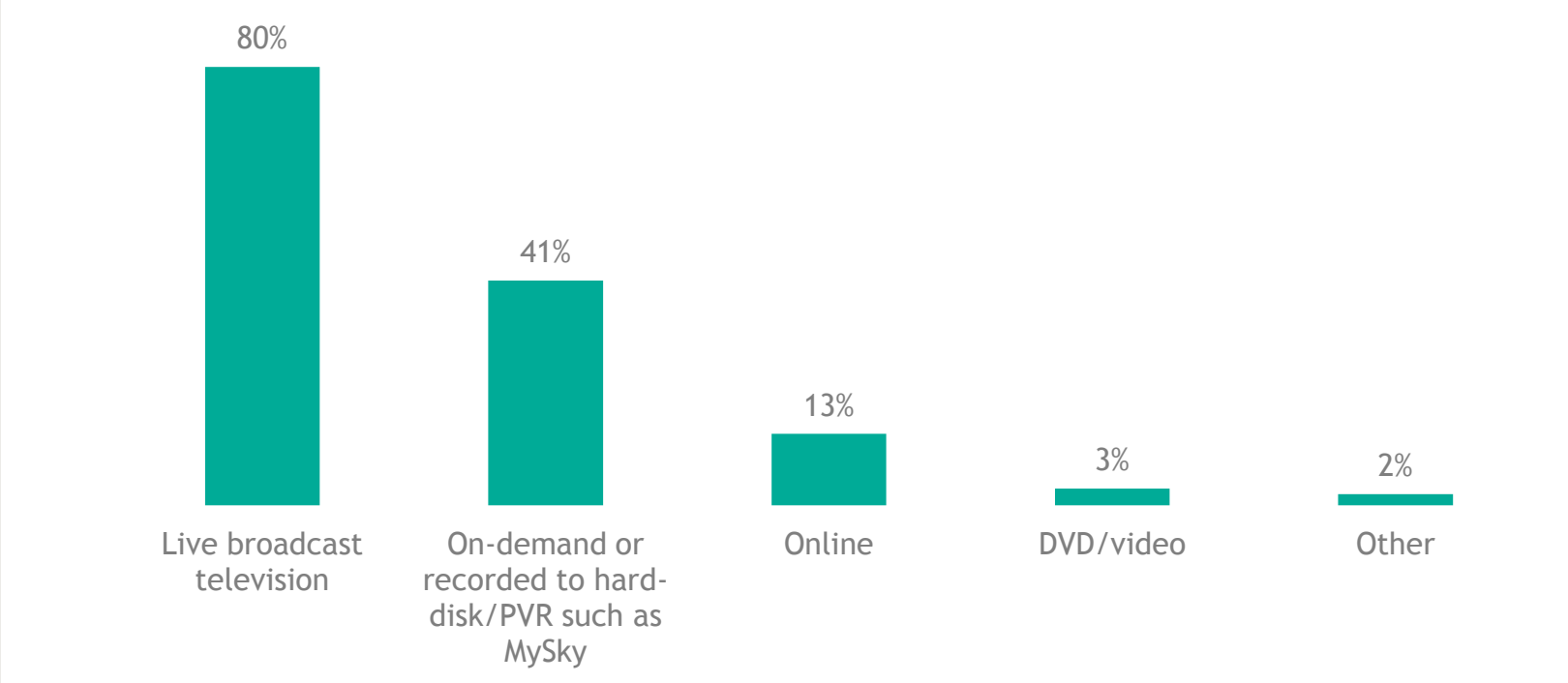
- *People in the middle age-brackets are more likely to say they watch documentaries*
(92% of 30-49 year olds and 94% of 50-69 year olds watch documentaries, compared with 84% of 15-29 year olds and 89% of those aged 70+).
- *Younger females are less likely than younger males to watch documentaries*
(78% of females aged 15-29 watch documentaries compared with 89% of males aged 15-29).

HOW PEOPLE WATCH DOCUMENTARIES



Eight in ten of those who watch documentaries do so on live broadcast television. On-demand is quite popular (41%). The popularity of different viewing platforms varies within the population (please refer to the next slide for details).

How do you watch documentaries?



Base: All respondents (n=908)

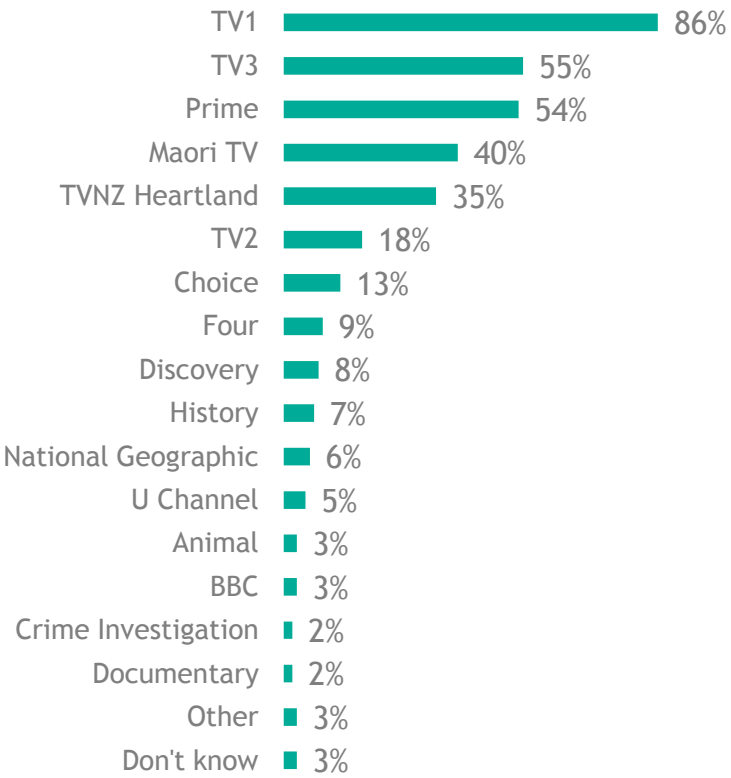


Differences in platform by demographic (among those who watch documentaries)

- *Single person households are more likely to watch documentaries on live broadcast TV (and less likely to use on-demand or online channels)*
(89% of respondents from single person households watch documentaries on live TV, 29% watch via on-demand and 8% watch online).
- *Older respondents are more likely to watch documentaries on live broadcast TV (and less likely to use on-demand or online channels)*
(87% of households aged 50+ watch via live TV, use of on-demand is 20% for 70+ year olds and 35% for 50-69 year olds. Use of online is 3% for 70+ year olds and 7% for 50-69 year olds).
- *Those aged 30-49 are the greatest users of on-demand*
(52% of 30-49 year olds use on-demand to watch documentaries).
- *Those aged up to 29 are the greatest users of online*
(24% of 15-29 year olds watch documentaries online).

TV1, TV3, Prime and Maori TV are the main channels associated with NZ documentaries.

Please name the main television channels you associate with NZ documentaries?

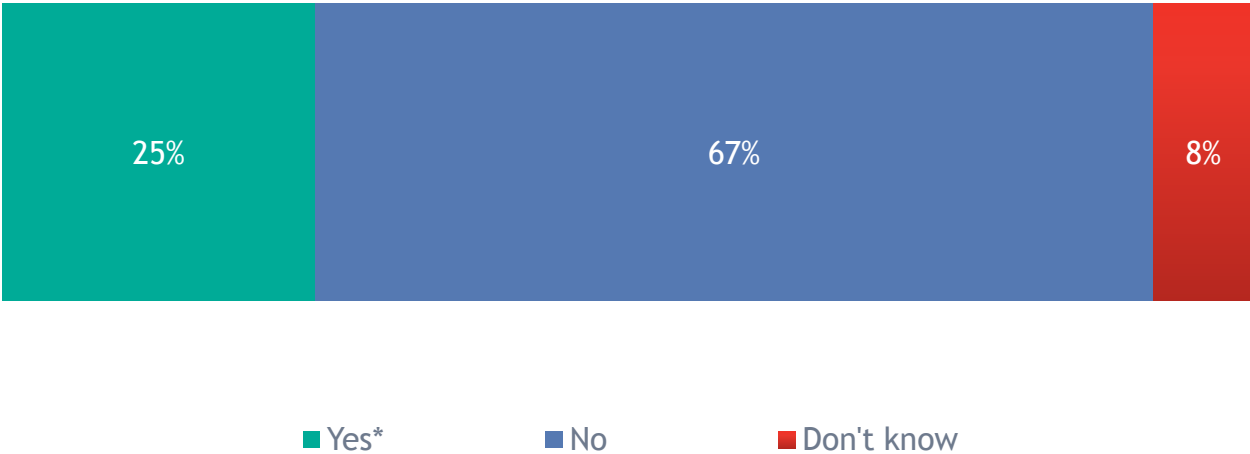


Base: All respondents who watch documentaries (n=908)



A quarter say the Internet is a channel associated with NZ documentaries

Do you think of the Internet as a channel associated with NZ documentaries?



** People aged under 30 are more likely to say this (47%). (There are no other variations in the population regarding this question).*

Base: All respondents who watch documentaries (n=908)

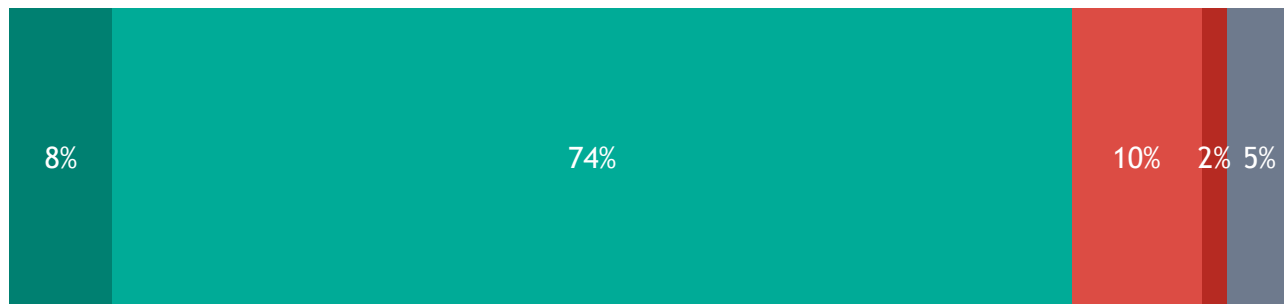


PREFERENCES AMONG DOCUMENTARY WATCHERS



One hour is the most popular length for a documentary (three-quarters prefer this length)

What is the best length for a documentary?



■ 30 minutes ■ One hour ■ One and a half hours ■ Longer than this ■ Depends on the content

Base: All respondents who watch documentaries (n=908)

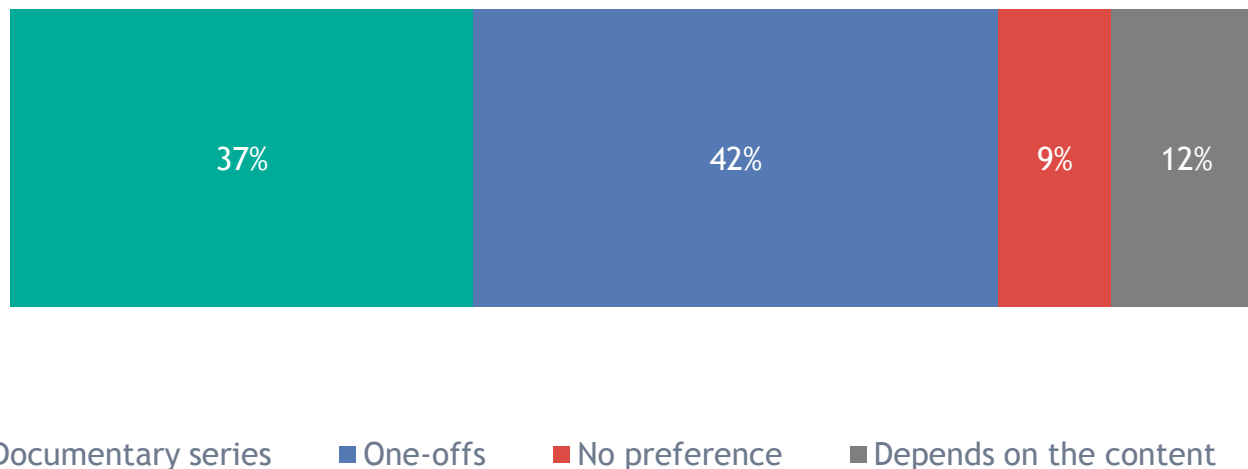
Differences in format preference by demographic (among those who watch documentaries)

- *Maori/Pacific respondents are more likely than other ethnic populations to prefer documentaries that last over an hour.*
(23% of Maori say this and 14% of Pacific say this, compared to 9% of Asians and 11% of NZ-Europeans/Europeans).
- *Single person households are more likely to prefer short documentaries.*
(14% prefer 30 minute documentaries, compared to 7% of respondents from larger households).
- *Older people are also more likely to prefer shorter documentaries*
(26% of those aged 70+ prefer 30 minute documentaries, compared to 4% of 15-29 year olds, 5% of 30-49 year olds and 11% of 50-69 year olds).

[Please note - there are no significant differences in preference for series vs. one-offs by demographic].

The population is reasonably evenly split when it comes to preference for series vs. one-offs.

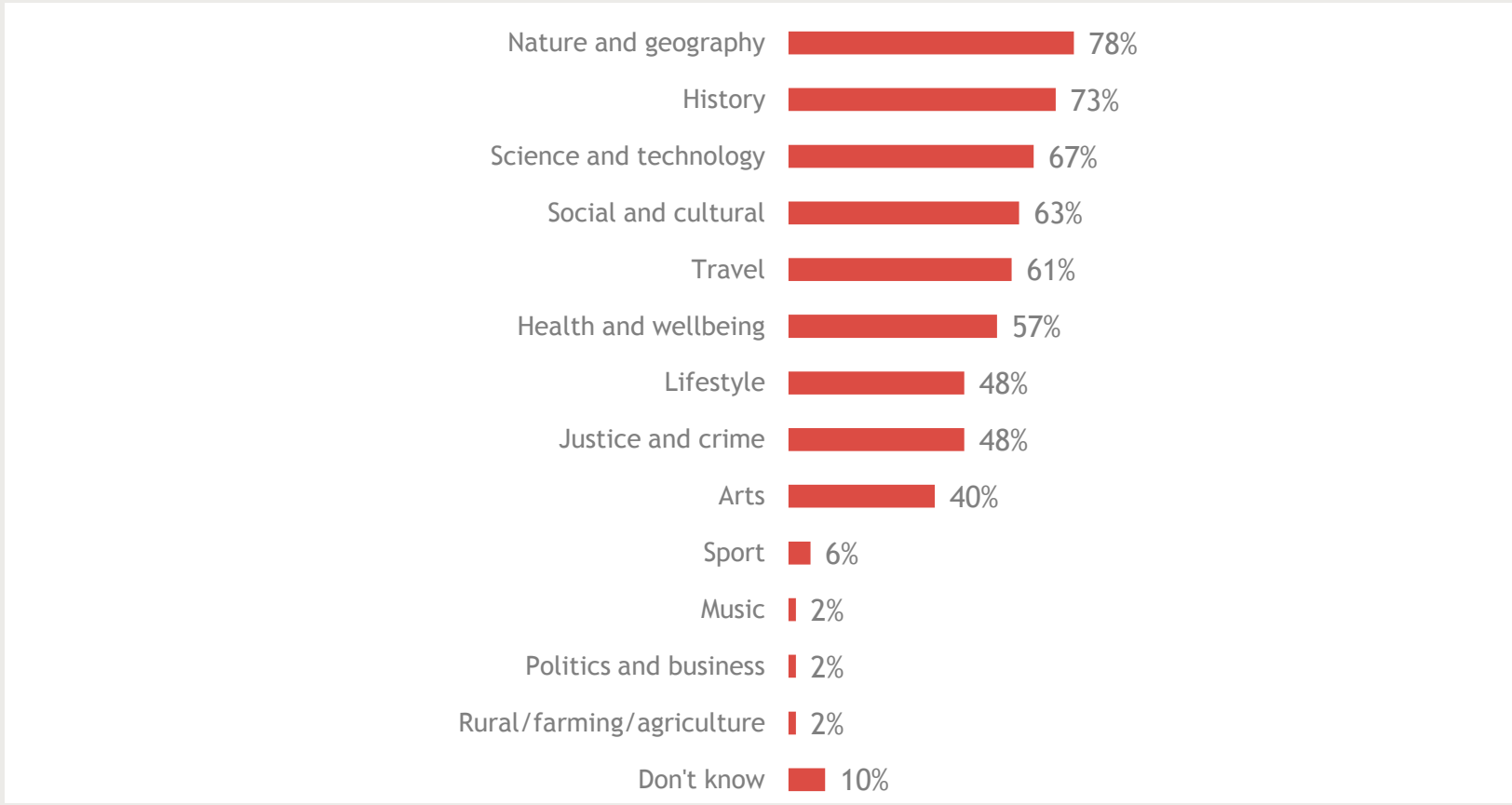
Do you prefer documentary series or one-offs?



Base: All respondents who watch documentaries (n=908)

Nature and geography, history, science and technology, social/cultural, and travel are the five most commonly requested topics for NZ documentaries.

What types of NZ documentaries would you like to see more of broadcast over the next 5 years?



Base: All respondents who watch documentaries (n=908)

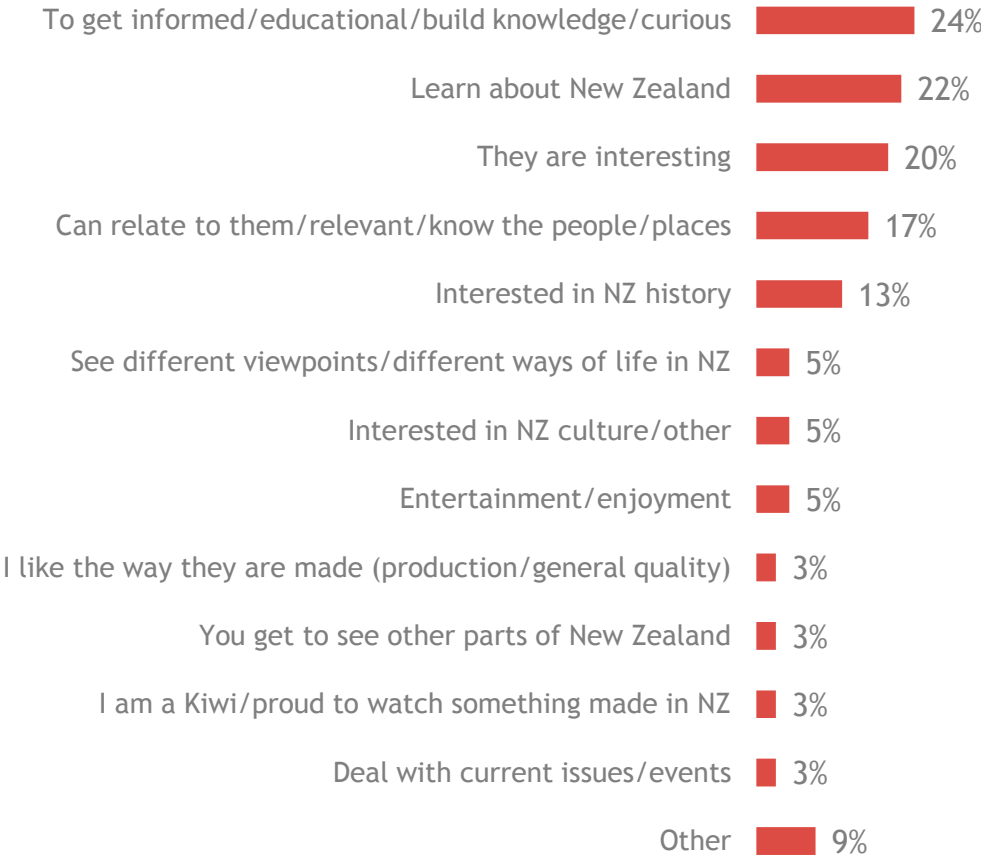


VIEWS ON NZ DOCUMENTARIES



People watch NZ documentaries for a wide range of reasons, including to build knowledge, learn about New Zealand, because of interest in the topic, and because they can relate to them (for example, they know the people or places).

Why do you watch NZ documentaries?



Base: All respondents who watch documentaries (n=908)



Why do you watch documentaries? Some quotes from respondents

“I guess it’s to understand our cultural background and what native creatures we have in NZ”

“It helps me to form an opinion to make choices and to be informed about the world around me”

“Because some of them are realistic and some of them make you more aware of what is going on around you. It can be a conversation point with your friends”

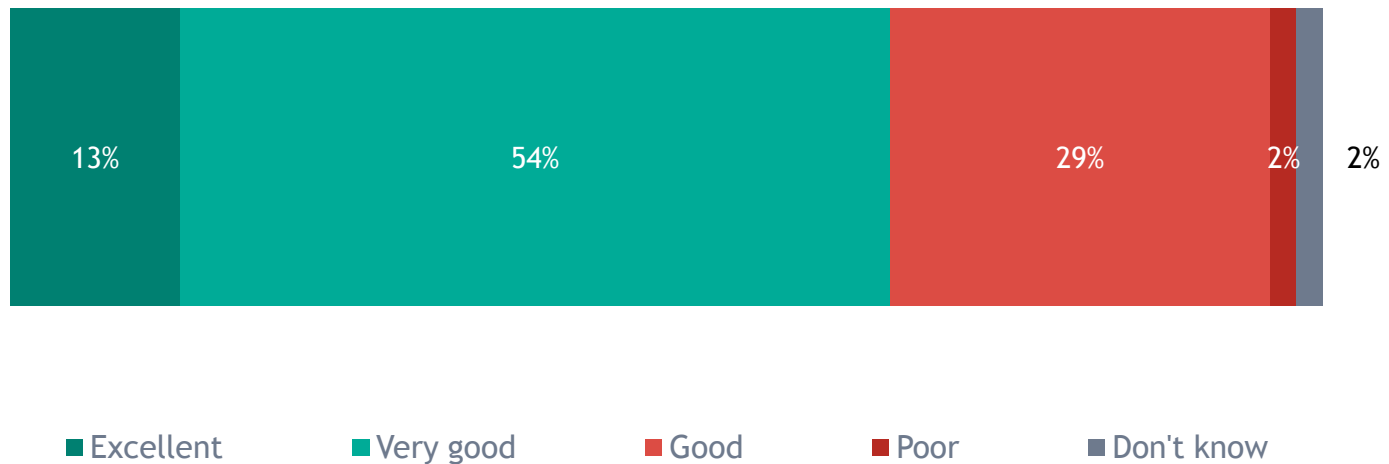
“Because I’m interested in my own country and what’s going on in it. I like to know more about New Zealand and the different cultures we have here now”

“For education. Any documentary is educational, you always learn something from it, otherwise it isn’t a good documentary”

“Because I think it is important from our own perspective as New Zealanders. We need to learn more about our own culture and country. Self-education to a point, but more New Zealanders should know more about their country than they do”

Most people rate the quality of NZ documentaries as either excellent (13%), very good (54%) or good (29%).

What do you think about the quality of NZ documentaries?



Base: All respondents who watch documentaries (n=908)

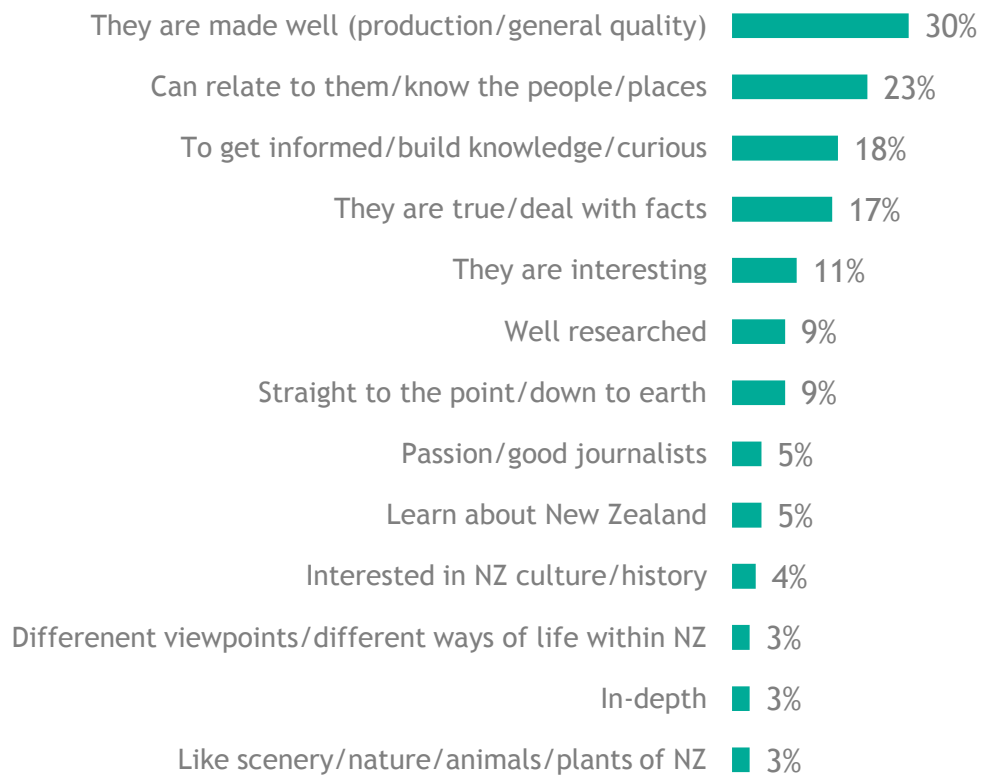
Differences in rating NZ documentaries by demographic (among those who watch documentaries)

- *Rating of NZ documentaries increases slightly by age (but it is not a strong trend)*
(62% of 15-29 year olds say NZ documentaries are excellent or very good, this compares with 66% of 30-49 year olds, 50-69 year olds and 72% of 70+ year olds).
- *Those of European (not New Zealand European) ethnicity (who are often British) are the most critical - but are still broadly positive*
(53% say NZ documentaries are excellent or very good - instead mostly rating NZ documentaries as 'good'. Whereas 69% of New Zealand Europeans say NZ documentaries are 'excellent or very good', 75% of Maori say this, 73% of Pacific say this and 58% of Asian respondents say this).

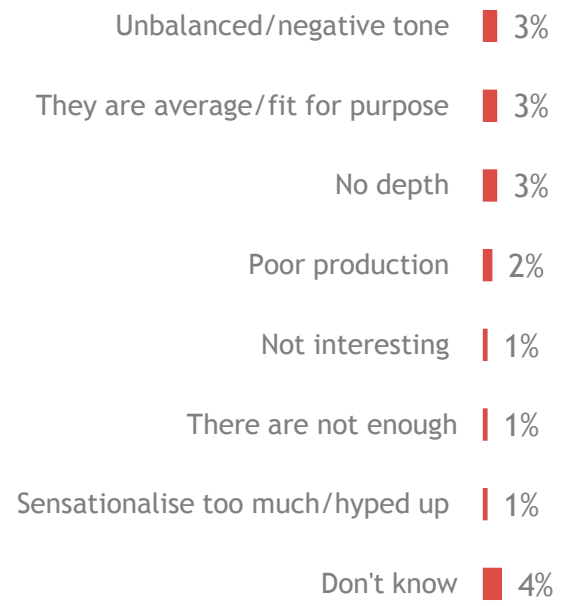
People who are positive about NZ documentaries often like the way they are made, find them relevant and rate the educational quality of the information. Not many are negative but some mention that NZ documentaries can be unbalanced, or lack quality and depth.

Why do you feel that way about the quality of NZ documentaries?

Positives



Negatives



Base: Selection of respondents who watch documentaries (n=195)

Why do you feel that way about the quality of NZ documentaries? Some quotes from respondents.

“They are about the places and the people you know. They let you know what is going on in New Zealand and what is going to be going on”

“I think the cinematographers here are well qualified. They take and make beautiful films of NZ sceneries. They are well qualified to do so. I think a lot of the interviewers in documentaries are also very talented”

“Some programmes you see over-sensationalise especially the American programmes! We are more down to earth with our programmes straight to the point, with a bit of honesty and integrity”

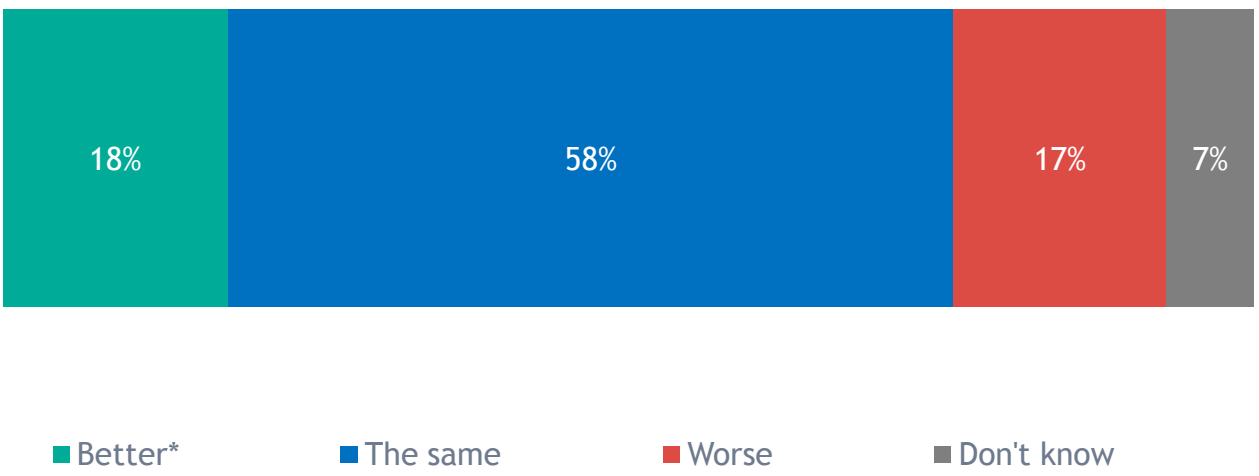
“I find the in-depth research that has gone into most of the New Zealand documentaries very interesting”

“I tend to like the way that it’s put across to us. I just see them as being quite professional and to the point”

“They often present the facts very well and they are often well done. They are interesting, they draw me in”

Almost 3 in 5 believe that NZ documentaries are not any worse or better than overseas documentaries. Others believe that they are better (18%), and some believe that they are worse (17%).

How do NZ documentaries compare with overseas documentaries?



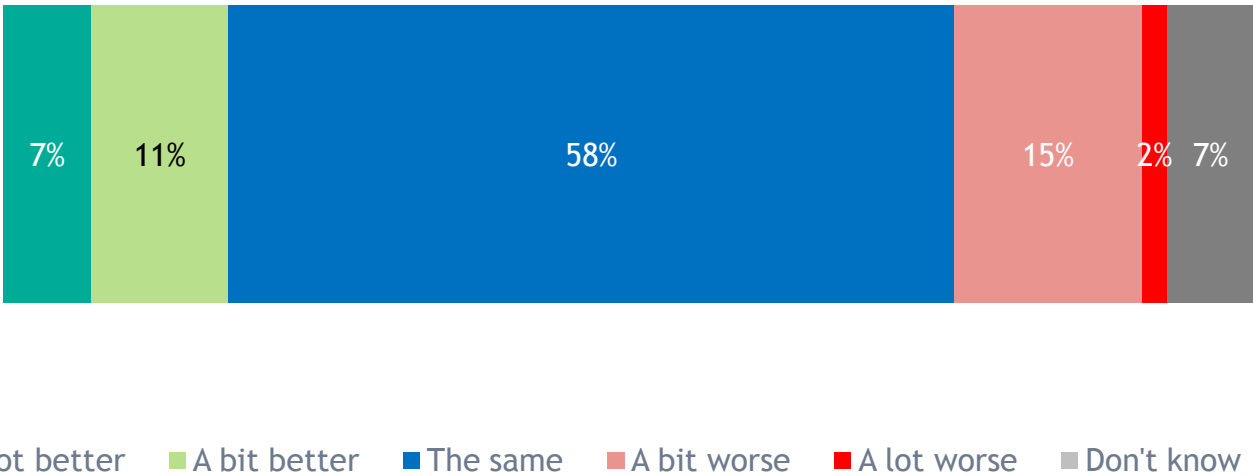
* The only significant difference by subgroup is that Maori and Pacific are more likely to say 'better' (28% of Maori and 43% of Pacific say that NZ documentaries are better).

Base: All respondents who watch documentaries (n=908)



This is the same data as the previous slide, but broken down by strength of feeling. This shows that only a small minority (2%) rate New Zealand documentaries as 'a lot worse' than overseas ones. 7% rate NZ documentaries as 'a lot better'.

How do NZ documentaries compare with overseas documentaries?



Base: All respondents who watch documentaries (n=908)



Most of those who believe that NZ documentaries are better than overseas documentaries say this is because of their personal relevance or because of the way NZ documentaries are made.

Why are NZ documentaries better than overseas documentaries?

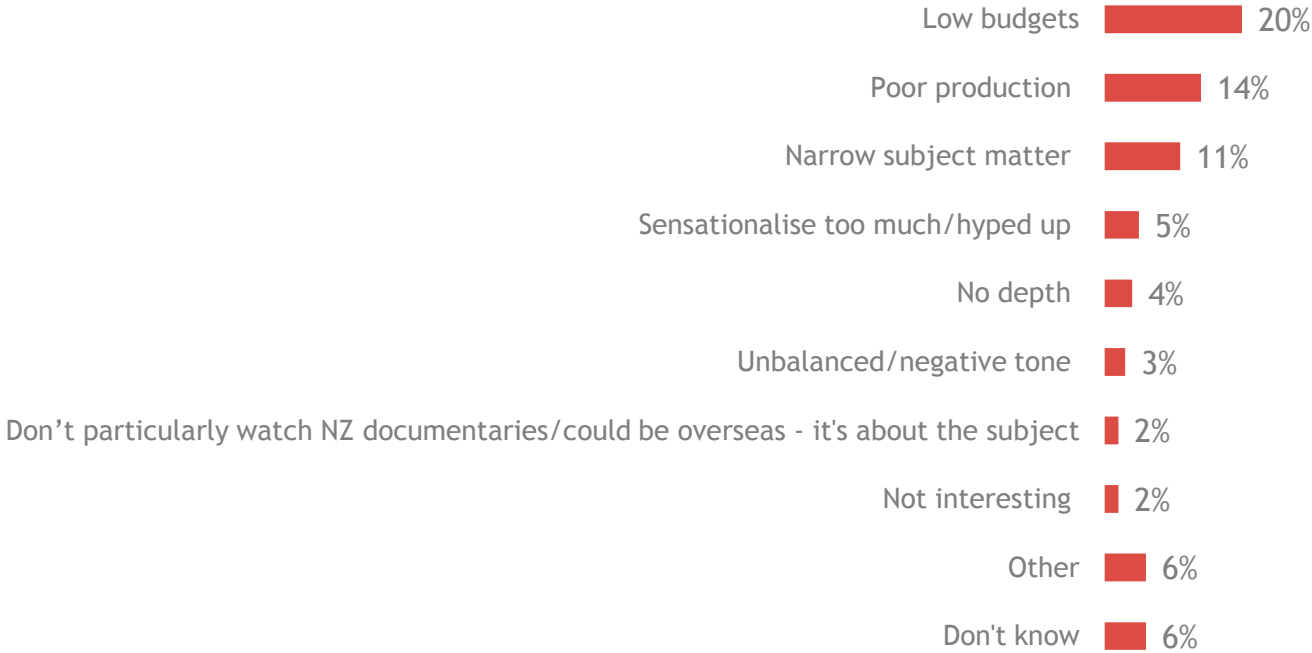


Base: Random selection of respondents who watch documentaries and believe NZ documentaries are better than overseas ones (n=54)



Most who believe NZ documentaries are 'worse' than overseas ones describe the low budgets, poor production or narrow subject matter.

Why are NZ documentaries worse than overseas documentaries?



Base: Random selection of respondents who watch documentaries and believe NZ documentaries are worse than overseas ones (n=54)



Why do you feel that way about NZ documentaries compared with overseas documentaries?

Positive quotes

“Because our reporters, investigators and researchers dig a lot more into the topic. And, they do seem to find out quite a lot of information”

“I just think NZ documentary makers tell their story as it is rather than having background music reaching a crescendo when they're telling you something. I like the matter of fact manner in the way NZ documentaries are presented”

“Well, you see more about your own country, and it's nice to see your own country”

“I think when we do a documentary we are more passionate about the subject and the content. I think we have the better visual approach to it as well so it looks good on TV”

“I think they are well made and put together. Well filmed. The local content does help”

Why do you feel that way about NZ documentaries compared with overseas documentaries?

Negative quotes

“Just the general quality of what they are showing. I feel that overseas documentaries go a bit deeper into things, New Zealand documentaries seem to just skim the surface a lot”

“I don't think they do as much in-depth reporting as some of the overseas documentaries. I don't think they do undercover work as much as overseas documentaries. I don't think they explore all the ramifications of what they're investigating fully. I think NZ documentaries rely on opinion pieces mostly”

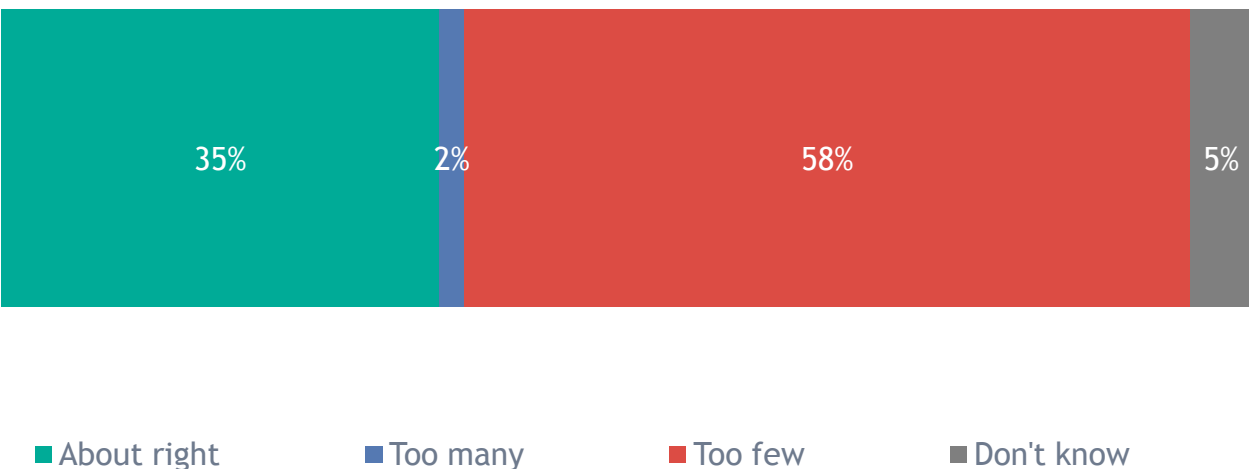
“Because we're not quite up with their technology and we're struggling to keep up with their technology - they're a bit further ahead than us”

“Most ones I watch are overseas ones and they tend to be on more interesting topics than New Zealand ones”

“We don't have the resources they have over there, we're only a little country”

Over half (58%) of the documentary watching public believe that there are too few NZ documentaries. Most of the rest say the balance is 'about right' (35% say this). Only 2% say there are too many NZ documentaries (the other 5% are unsure).

Are the number of NZ documentaries...?



Base: All respondents who watch documentaries (n=908)



Differences in opinion about the number of NZ documentaries by demographic (among those who watch documentaries)

- *People in the North Island are more likely to feel there are too few NZ documentaries, compared to people in the South Island.*

(60% of people in the North Island say there are too few NZ documentaries compared with 50% of people in the South Island - note that most people who do *not* say there are too few tend to say the amount is 'about right' - that applies in both the North & South Island).

- *Those aged 30-49 are more likely to say there are too few NZ documentaries (and those aged 70+ are least likely to say there are too few).*

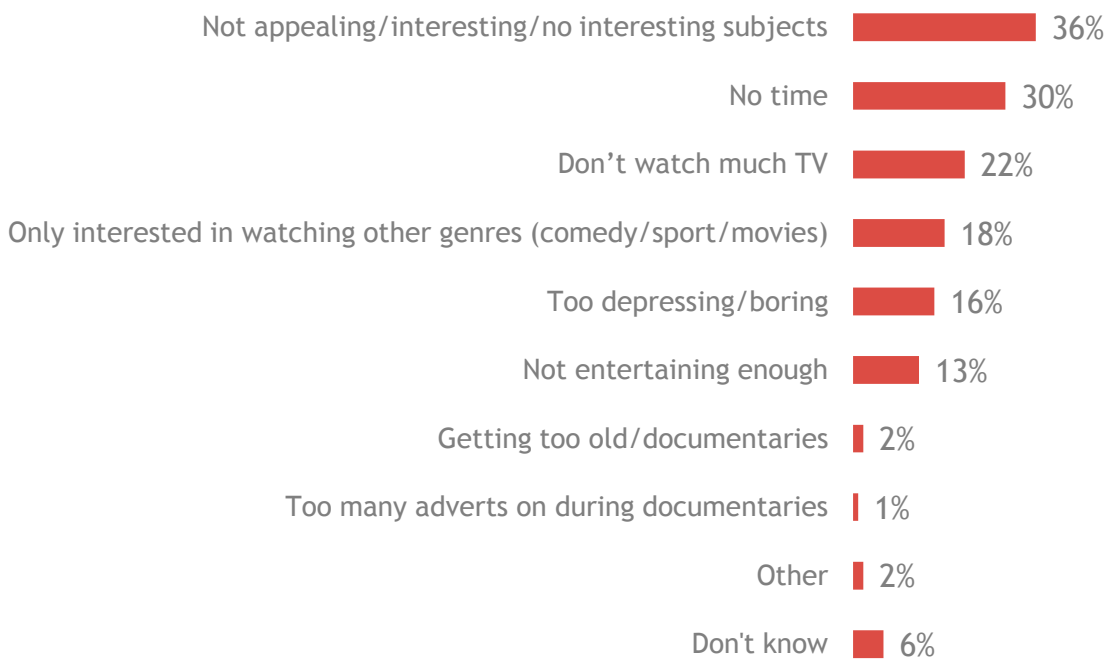
(56% of 15-29 year olds say there are 'too few', **64% of 30-49 year olds say 'too few'**, 55% of 50-69 year olds say there are too few and 45% of those aged 70+ say 'too few'). Please note - in particular males aged 30-49 are more likely to say there are too few (68% of this group say there are too few).

PEOPLE WHO DO NOT WATCH DOCUMENTARIES



The five most common reasons for not watching documentaries are the lack of appeal in the subject matter, lack of time, not watching much TV in the first place, a prime interest other genres (such as sport or comedy), or because documentaries are perceived as boring or depressing.

Why do you not watch documentaries?



Base: All respondents who do not watch documentaries (n=94)



“Well they don’t interest me. I like the music documentaries on sky television. But normally, I guess they’re boring”

“Because at the end of the day I like to sit down and watch something that is not too heavy or thought provoking”

“I’m more interested in the entertainment based programmes. Documentaries aren’t entertaining enough”

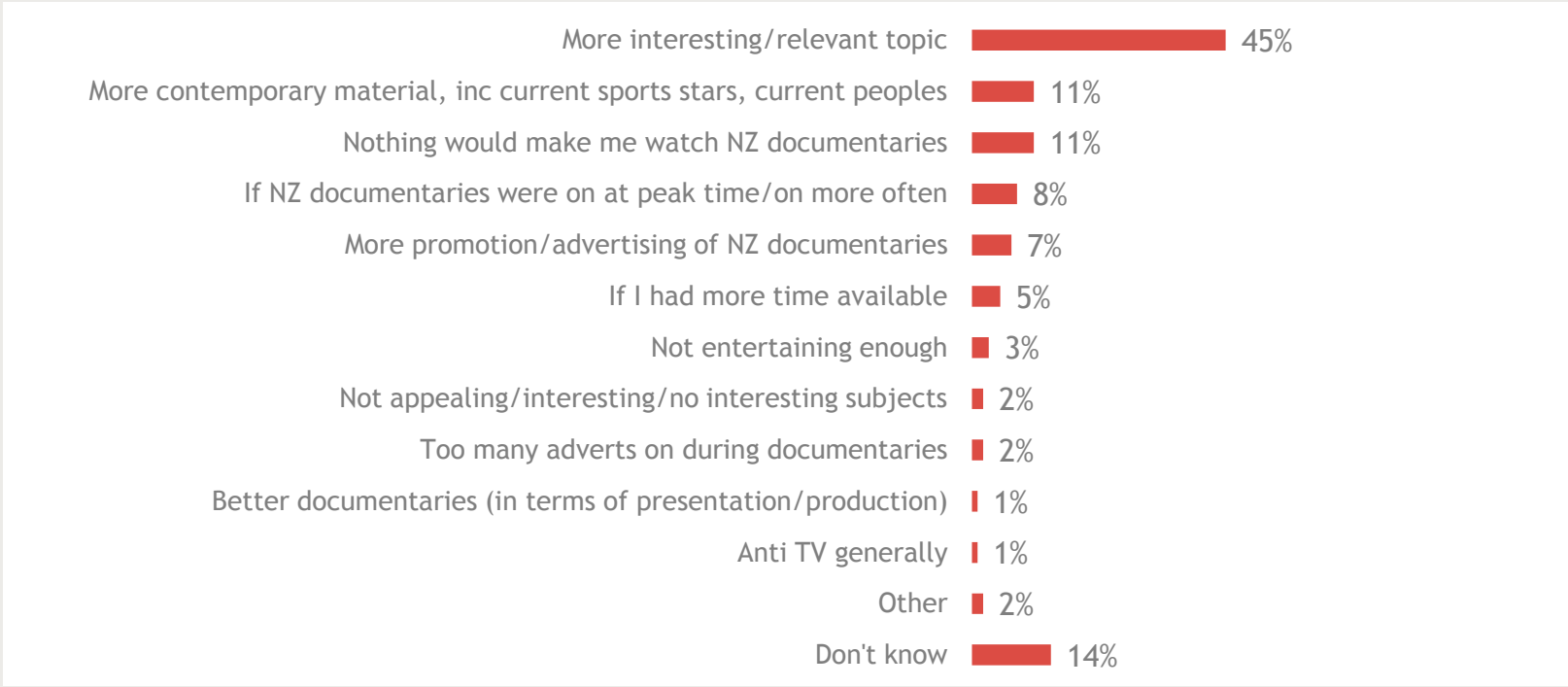
“I don’t really watch that much TV. None of the documentaries really catch my interest”

“I have no time. I’m always outside doing cycling, and I try not to watch too much TV”

“I just haven’t really found one that appeals to the kind of things I’m interested in”

The largest incentive to watch NZ documentaries (among those who do not watch documentaries) would be a more interesting or relevant topic. Although just over one in ten say they would be drawn towards more contemporary material. Some say they will *never* watch NZ documentaries (11% of those who do not watch documentaries say this).

What would encourage you to watch NZ documentaries?



Base: All respondents who do not watch documentaries (n=94)



“Something more interesting. I would need to relate to the topics to watch them and find it interesting”

“Probably if they were advertised more, other programmes are well advertised, but there seems to be less promotion of these”

“I don't think I'd really be that interested. It's just not my thing, I'd rather watch something entertaining rather than informative”

“Maybe if they are more current, you find a lot that are more history based so maybe more current documentaries”

“Probably reasonable time slots for convenience. A convenient time to watch it”

“I guess it's got to be on an engaging subject matter”