

Local 2000

New Zealand Television

Content

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Chairman's Introduction

NZ On Air was set up in 1989, to provide public broadcasting services, the only public policy intervention in an otherwise fully commercial market.

NZ On Air's primary responsibility in the television area has been to "reflect and develop New Zealand culture and identity", by adding to the quantity and diversity of New Zealand-made programmes which reach our screens. In other words, NZ On Air has provided funding for a diverse range of locally-made television programmes, to screen on commercial television.

In its first year of operation, NZ On Air established, as a monitoring mechanism, the Local Content Survey. The annual survey was intended to track the *quantity* of locally-made television programmes being screened on national free-to-air channels each year, as a proportion of the whole television schedule. The survey tallied up programmes by genre, and measured such factors as how much of the local content was first-run, and how much was repeats, how much was screened in prime time, and how much in offpeak hours.

This survey has now been conducted, to largely the same format, each year, since 1989. It is - and always has been - a blunt instrument, measuring only the number of hours of locally-made programmes on New Zealand television and, to a certain extent, the diversity, through its analysis of hours within each programming genre. It does not make any comment or judgement on the quality or the educational value of the programmes, or the extent to which they "reflect and develop New Zealand's culture and identity".

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

Is it still a useful survey? We believe so, as long as its limitations are taken into account and additional research and consultation is undertaken to provide qualitative information. NZ On Air has an annual programme of research which combines quantitative and qualitative research, audience and academic research, to provide a rounded view of the New Zealand television environment.

This year we have introduced some long-overdue changes - for example the reclassifying of programmes into more appropriate genres, an analysis of local content in the eighteen hour period from 6am to midnight, to allow a more valid comparison with Australian local content figures - but otherwise the methodology is unchanged. This allows us to continue to make meaningful comparisons with previous years.

So what does the survey of Local Content in 2000 tell us?

At the high level, it tells us that New Zealand citizens see less of themselves on air than do Australians, Canadians, Irish, British or American citizens. In New Zealand, local programming accounts for less than a quarter of total transmission time, compared with, for example, the 55% minimum achieved in Australia. Even when we adjust for an 18-hour measurement then only TV One is approaching the levels of local content enjoyed by Australians on their three major, free-to-air channels. On an eighteen hour clock the average across the three free-to-air channels rises to 31%, however.

But if you mine into the detail, there are a number of positive signs which are worthy of note.

In previous surveys, we have expressed concern at declines in drama and children's programming, while news, entertainment and information all increased. The 2000 year saw a slight reversal of that trend. In 2000, entertainment hours dropped and news and current affairs remained almost static, while slight increases were recorded in drama, Maori and first-run children's programmes.

These are areas where NZ On Air funding is a significant contributor. These genres are assessed as being in need of NZ On Air subsidies because of their cost and/or lack of commercial viability. They remain the ones most in need of assistance, and so we welcome even these slight increases.

In addition to this, the following gives us cause for hope:

- Total local content hours increased to approach levels not seen since 1998 (when local content reached its highest level since the beginning of the survey)
- *First-run* local content hours increased by 7%, bringing first-run hours to 5182, the highest level on record. (This was balanced by a corresponding drop in the level of repeats.)
- TV2 significantly increased its commitment to drama and comedy, leading to a more diverse local content diet for New Zealand television viewers.
- The level of Maori programming has increased markedly, albeit from a low base.
- There was an increase in first-run children's programmes, mainly reflecting a continued commitment to this genre from TV2. Because this is offset by a decrease in the amount of repeated children's programmes, there was no overall increase in children's programmes.

Balanced against this, however, the genre mix in local content for 2000 still strongly favours news (where the marginal cost of production is lower over a certain volume than for other genres), cheaper information programmes (with low-cost/high-hour returns) and sport.

The gains made by TV2 in drama were unfortunately offset by declining or static results on the other two channels. This underscores the need for long-term planning on the part of broadcasters and NZ On Air to avoid the stop/start approach to drama/comedy that has been evident in recent years. NZ On Air's drama strategy, initiated in 2000, has already made some progress in addressing this issue.

Overall there was a decline in children's programming due to a decrease in the level of repeats screened. It should be noted that repeats are a valid form of programming for younger children as repetition is positive for very young viewers, and programmes can be re-screened to benefit emerging audiences. NZ On Air has, however, repeatedly drawn attention to the need to boost locally-made programmes for New Zealand children - including both first-run and repeats - in the last two years.

We have seen in recent years a decline in the proportion of local content which has been made with NZ On Air funding. This trend continued in 2000. In 2000 NZ On Air contributed to 20% of the total local content hours on television, compared with 25% in 1997.

When this is considered alongside the fact that overall local content remains stable, we can see that broadcasters are contributing solidly to the local content total, with more programmes produced without a subsidy. Such programmes are generally more commercial, or lower cost, than NZ On Air funded genres.

The decline in the number of NZ On Air-funded hours also indicates what has been apparent for some years now: that we have gone beyond the point of maximum sustainable yield and are now in an environment of diminishing returns. In other words, our choices are either to hold budgets and maintain target hours (with a risk of compromising programme quality), or to accept that fewer hours will be produced in order to allow programmes with higher on-screen production values.

The increases mentioned above show that there is no longer any unwillingness on the part of broadcasters to screen local content. The increase in first-run hours shows that in fact the opposite is true. Therefore the main factor constraining the level of local content is the cost of locally-made programming. A market the size of New Zealand struggles to compete with off-the-shelf programming from bigger markets that can be purchased - effectively "second hand" - at a fraction of the price of local production.

At the time of writing, the Government's review of broadcasting is still under way. A charter for TVNZ has just been presented, for implementation in July 2002. The next stage of the review will include decisions on quota mechanisms for both television and radio and a review of funding sources and processes. It is this last factor that will have the biggest impact on the quantum of local content. Throughout the history of television in New Zealand, regardless of the system in place, locally-made programmes have hovered around the 20% level, although overall hours have increased with the growth in the number of channels.

It is our hope, therefore, that this review of broadcasting will ultimately result in an increase in the quantity and diversity of local content we see on our screens.

David Beatson

Chairman

April 2001

Executive Summary

The main trends in the screening of New Zealand-produced programmes¹ on the three nationwide television channels in 2000, since the last local content survey of 1999 programmes, were:

Hours

- Total hours of local programmes increased to 6186, up 44 from 6142 hours in 1999 (refer fig 1)
- Total first-run hours (prime time and offpeak) increased by 7% from 4830 hours in 1999 to 5182 in 2000 (refer fig 2)
- Total repeat hours dropped to 1004 hours, the lowest level since 1995, primarily because there was no repeat screening of *Good Morning* on TV2, no repeat of *Five O'clock with Jude Dobson* and reduced repeats of Children's programmes on TV3 (refer fig 4)
- These fluctuations mean that, overall, local content remained static, comprising 23.5% of the total broadcast hours in 2000, compared to 23.4% in 1999 (refer Appendix 3)
- News and Current Affairs remains the single largest local content genre, once again comprising 30% of total local hours (refer Appendix 3)

Channel Output (refer Appendix 2)

- As a percentage of their total broadcast hours (24 hours a day) channel output was relatively static:
 - TV One screened 37% first-run local content, a 1% increase over 1999 figures
 - TV2 screened 9% first-run local content, down 1% on 1999
 - TV3 screened 13% first-run local content, up 4% on 1999
- As a percentage of their prime time hours (6pm – 10pm):
 - TV One screened 55% first-run local content (down 3% overall from 1999), 18% excluding News (down 6%)
 - TV2 screened 18% first-run local content (down 5%)
 - TV3 screened 36% first-run local content (up 1% overall), 12% excluding News (static)

Channel Increases (refer Appendices 2 and 3)

- TV One increased Documentary hours by 23 hours
- TV2 increased its first-run Children's programmes by 15 hours
- TV2 increased its first-run Drama/Comedy programmes by 22 hours
- TV3 increased its first-run Maori programmes by 44 hours
- Sports hours on TV3 almost quadrupled, while TV One held its own in Sports due to the Olympic Games and America's Cup
- TV One increased its first-run local content, mainly due to a 122 hour increase in Information programming
- For the first time an increase in TV One total local content was not due to an increase in News and Current Affairs programming
- TV One screened the highest prime time hours of any channel (but this was still a decrease of 35 hours from 1999 levels)
- TV One increased Entertainment hours primarily due to an increase in repeats

Channel Decreases (refer Appendix 2 and 3)

- TV One's Drama/Comedy hours reached the lowest level since 1992 and TV3's remained static
- TV2's prime time local content dropped by 72 hours
- TV2's Entertainment hours plummeted mainly due to the demise of *Ready Steady Cook*
- Documentary hours declined on TV2 and TV3
- No first-run Children's Drama screened on any channel
- The sole Children's Drama output was a rerun of *Mirror Mirror*
- The percentage of local content that is repeat programmes is the lowest it has been since 1995

Other (refer Appendix 7, 10 and 11)

- Of the two 'semi-national' free-to-air channels (TV4 and Prime), Prime screens a comparatively high level of local content, 653 total hours (down 334 from last year) comprising the 'infomercial' *Prime Living* plus local sport and local news. The channel does not broadcast for twenty-four hours and over one third of its local content hours are repeated programmes (down from one half last year).
- TV4 screens very little local material. Its total local output in 2000 was up by 47 hours to a total of 166 hours. 102 hours of this total were repeated programmes.
- Of the Sky pay TV channels, Sky Sport continued to carry the majority of local content, screening 19% in 2000. HBO dropped back from last year's high of 65 hours, to a total of 8 hours. It seems the slack has been picked up by the new *Sundance* channel which screened 110 hours of local feature film and feature documentary reruns.
- The impact of the reduced spending power of NZ On Air remains evident. NZ On Air contributed funding for 20% (1248 hours) of the total New Zealand hours in 2000, compared with 21% in 1999, 23% in 1998 and 25% in 1997.
- NZ On Air contributed towards just under 14% (731 hours) of 2000's first-run hours, compared with 15% of 1999's first-run hours, 16% in 1998 and 18% in 1997.

Thirteen Years Of Local Content

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

In 1988, two channels were broadcasting and neither transmitted for twenty-four hours a day. Total broadcast hours nearly doubled in 1990 with the introduction of the third nationwide channel. By 1999 the television environment was markedly different with competition to the three free-to-air national services deriving from:

- two free-to-air channels with around 70% national coverage (TV4 and Prime TV)
- over 40 pay television channels offered by Sky and Saturn. TV3 is also now carried on the Sky platform.
- independent free-to-air regional television comprising several small local ventures from north of Auckland to Southland, including two in Christchurch
- one community channel, Triangle TV, in Auckland

In this environment, the overall amount of New Zealand programming on the free-to-air national television networks has nearly tripled, rising from 2111 hours in 1988 to a high of 6296 hours in 1998 (see Figure 1).

Options for a Maori channel are still being considered and TVNZ has recently announced a partnership with Telstra/Saturn to launch a digital platform.

2000 Results: Total Hours

The decrease in total New Zealand programme hours broadcast on TV One, TV2 and TV3 noted in last year's survey, reversed slightly in 2000. In 1998, 6296 hours was achieved and in 1999, 6142 hours. This year the total hours were 6186. This increase was not enough to dramatically alter the percentage of local content which was 23.5% in 2000 compared with 23.4% for 1999.

TV One

- screened 3544 hours in 2000 (up 28)
- screened more than double the local content hours of both TV2 and TV3
- despite losing major sporting codes to TV3, held its own in sport as a result of the Olympic Games and America's Cup
- experienced a sharp decline in Drama/Comedy hours from 25 hours last year to just 5 this year
- increased its first-run local content by 118 hours
- screened 37% first-run local content (3234 hours), 1% higher than in 1999

TV2

- screened 1158 hours in 2000 (down 134)
- lost ground in its first-run local content, back 90 hours to 800
- this decrease was also reflected in a decrease in its prime time local content of 72 hours, mostly due to a significant decrease in Entertainment hours
- continued to be well ahead of TV One and TV3 in the screening of New Zealand made drama and comedy
- Increased Children's hours to 404 from 286 in 1999. This increase was due mainly to a four-fold increase in the number of repeats
- screened 9% first-run local content (800 hours), down from last year's 10% (891 hours)

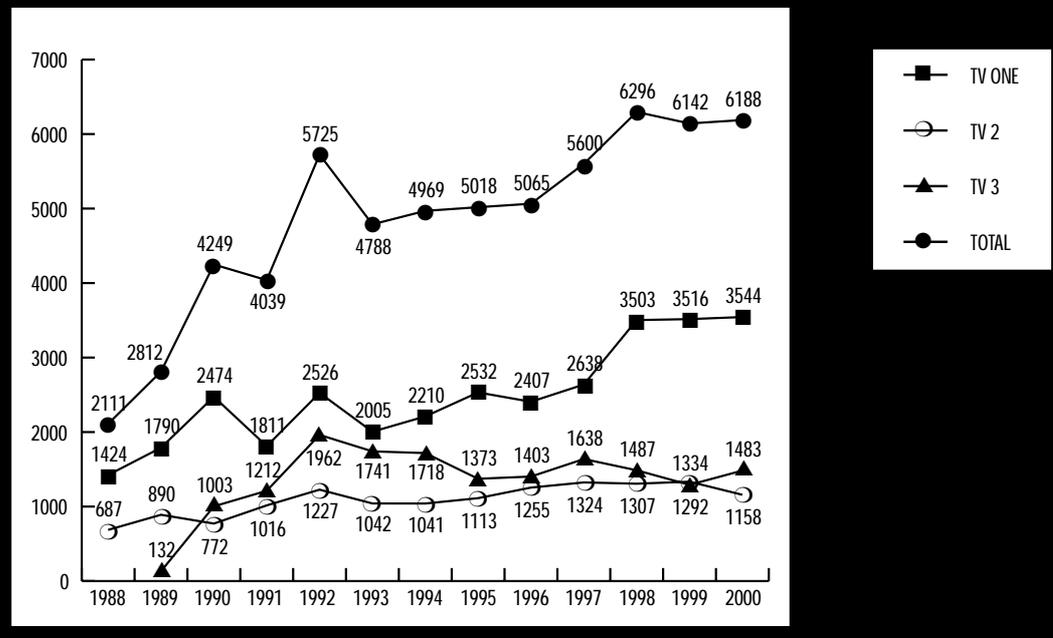
TV3

- started to regain the ground it lost between 1997 and 1999 by increasing its total local content hours by 192 to 1483
- this increase was due largely to a significant increase in its hours of sports coverage
- continued to screen only 10 hours of first-run Drama/Comedy
- screened 13% first-run local content (1149) compared with 9% in 1999 and 10% in 1998
- decreased the number of children's hours due to a decrease in the number of repeats, more than off-setting the increased repeats by TV2 in this category.

Appendix 2 sets out the total hours results for TV One, TV2 and TV3 in 1999.

Fig 1

Total NZ hours by channel



Appendix 3 sets out total hours of New Zealand programming by genre from 1988 to 1999 (comprising first-run and repeats across all three channels). Comments on specific genre variations between years are made in section 8 below.

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

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

In 2000, between 12.00 midnight and 6.00am:

- TV One screened 13.5 hours of repeat programmes
- TV2 screened 16.5 hours of repeat programming; and
- TV3 screened no local content during these hours

Based on an eighteen hour clock (6588 per channel), the percentages of local content screened are calculated below, and become:-

- TV One 53.6%
- TV2 17.3%
- TV3 22.5%

This simple analysis shows that, while TV One is almost at the level of local content achieved by quota regulation in Australia, the average level of local content across the three channels moves from 23.5% to 32% when measured in this way.

	Total Hours	Minus 12.00-6am	Sum	18 hour clock	%
TV One	3544	13.51	3530.5	6588	53.5%
TV2	1158	16.5	1141.5	6588	17.3%
TV3	1483	0	1483	6588	22.5%

First-run Hours

First-run hours include both peak and offpeak programming. As Figure 2 below demonstrates, total first-run hours increased by 352 hours (from 4830 hours in 1999 to 5182 hours in 2000) mainly due to the significant increase in sport on TV3 and an increase in both Information and Maori programmes.

- For the first time since 1996 there was a decline in entertainment mainly due to the decline in TV2 hours in this genre
- Information programming leapt ahead with an increase of 149 hours to an all time high of 892
- First-run Children's hours increased by 11 hours. This is the first time there has been an increase in this genre since 1992
- The battle for sporting rights between the pay and free-to-air television channels in recent years has clearly affected free-to-air output. This year TV3 was the beneficiary of the collapse of agreements between Sky and TVNZ and consequently almost quadrupled its output of Sports hours
- Hours of Drama/Comedy remained static. Documentary hours decreased. Maori programmes increased markedly, due mainly to the inclusion of one full year of TV3's *Pukana*

Fig
2

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

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

As a percentage of their total broadcast hours (calculated as 8784 hours this year, due to the leap year, per channel):

- TV One screened 37% first-run local content (cf. 36% in 1999)
- TV2 screened 9% first-run local content (10%)
- TV3 screened 13% first-run local content (9%)

If, once again, we do the eighteen hour calculation, then

- TV One screened 49% first-run local content
- TV2 screened 12%
- TV3 screened 17%

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

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

TV One

- continued its progressive improvement in new local content hours. For the first time this was due to a category other than News and Current Affairs. This category was Information.
- while Entertainment held static, Drama/Comedy experienced a marked decline to reach the lowest level since 1992.
- continued to screen more than twice the new Documentary hours of TV3
- 91% of TV One's total local content hours were first-run (up 2% from 1999)

TV2

- increased first-run output in Children's, Drama/Comedy, Information and News
- pulled back considerably on Entertainment and Sports output
- increased its Drama/Comedy output by 22 hours, staying well ahead of the other two channels for this genre
- moved back into third place in terms of first-run hours screened (after surpassing TV3 last year)
- 69% of TV2's total local content hours were first-run, up 2% on 1999

TV3

- showed slight increases in News and Information
- showed a large proportional increase in Maori programming
- Sports coverage almost quadrupled from 1999
- Drama/comedy hours remained static
- 77% of TV3's total local content hours were first-run compared with 64% for 1999. This was due almost entirely to the increase in Sports

Fig
3

First Run Hours (Peak And Offpeak) By Channel

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

6

Repeat Hours

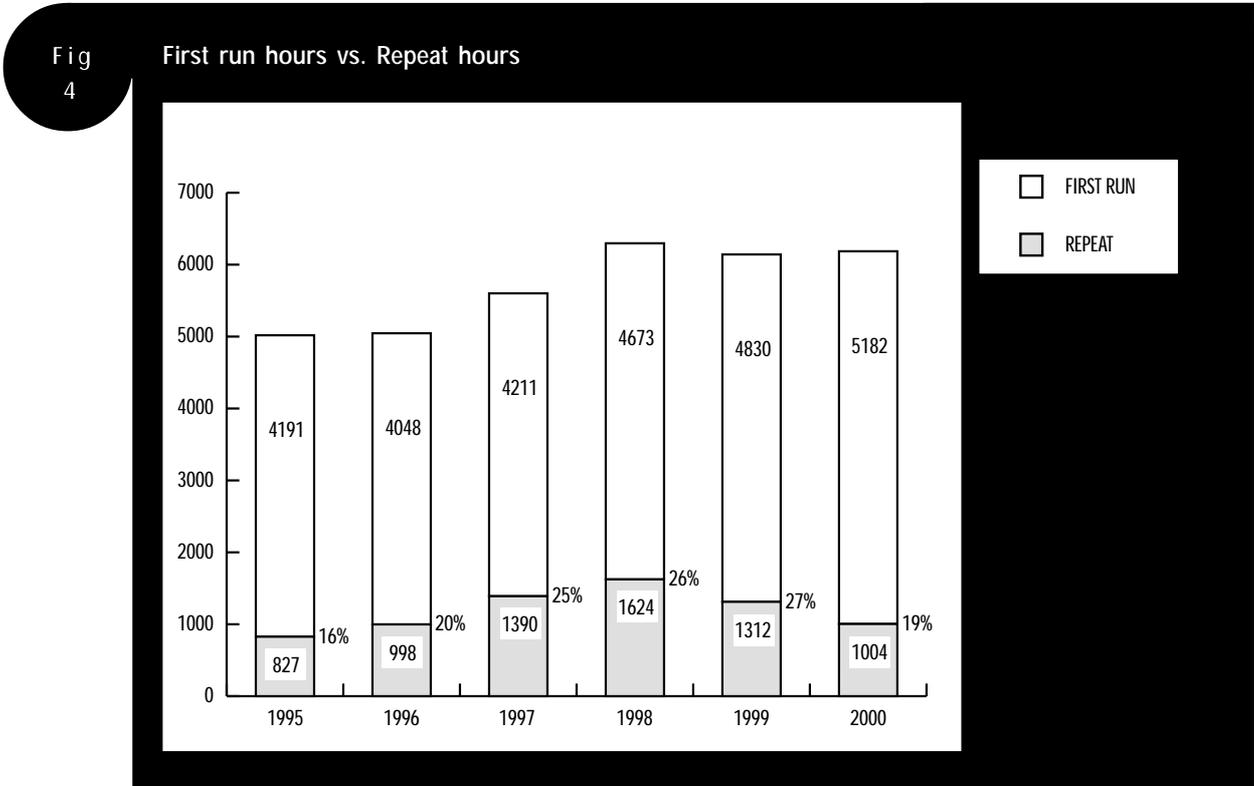
Repeated programmes are not usually a feature of prime time (although levels are higher over the summer holidays). Repeat programmes are screened by channels partly as a result of the demands of 24-hour transmission (ie. the need to screen cheap programmes in uncommercial slots such as very early morning)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

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

The total for hours of repeats was 1004, down from 1312 in 1999.

Major fluctuations in levels of repeat programmes tend to be related to the scheduling of high volume infomercial-oriented programmes. In 2000 the decrease in repeat hours was primarily due to TV2 no longer repeating *Good Morning* which first screens on TV One, and there being no repeat of *Five O’Clock With Jude Dobson* on TV One. The significant drop in TV3 repeats of Children’s programmes (140 hours) was almost compensated for by TV2 increasing repeats in this genre by 102 hours.

These changes have meant that for 2000, repeat programmes (as a proportion of first-run hours) were 19% - the lowest they have been since 1995. This is a significant decrease on 1999’s 27%.



Prime Time Hours

Prime time² first-run figures are a useful guide to whether production spending by the television networks is holding its own. As prime time attracts the biggest audience, and consequently has the biggest revenue potential, it is logical that most network production dollars will be spent on programming in this time band.³

In 2000 total prime time hours decreased for the first time after a gradual increase since 1995. Total prime time hours were 1602 in 2000 compared with 1686 for the year before. This appears to be mainly due to a marked decline in Entertainment programmes on TV2.

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

As a percentage of their prime time schedules (calculated as 1480 hours per annum per channel, as a result of the leap year):

- TV One screened 54% first-run local content (cf. 58% in 1999)
- TV2 screened 18% first-run local content (23%)
- TV3 screened 36% first-run local content (35%)

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

- TV One: 18% (24% in 1999)
- TV2: 18% (23%)
- TV3: 12% (12%, 17% in 1998)

TV One

- screened the most prime time local content of all channels, 803 hours, but this was a decrease on last year's 839 hours which almost equaled the 1993 record of 843 hours
- the decrease was due mainly to decreases in the Sports and Drama/Comedy genres

TV2

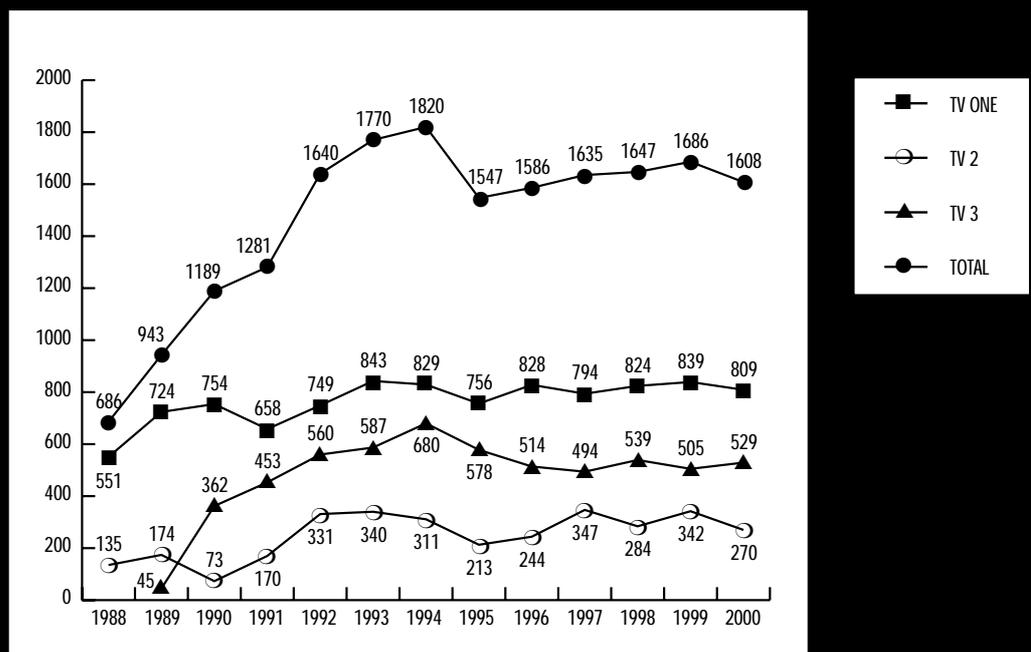
- lost the ground it gained last year with a decrease of 72 hours, mostly due to a decrease in Entertainment hours caused by not continuing *Ready Steady Cook*, which screened weeknights at 6:00pm throughout 1999
- increased its commitment to Drama/Comedy

TV3

- increased its primetime local content by 24 hours
- continued to screen very few commissioned drama or comedy programmes
- decreased the number of documentaries in primetime by 20 hours

Fig 5

Prime time hours by channel



8

Trends by Genre

A brief comment on the 2000 trends follows. Statistics for each of the nine genres by channel are summarised in Appendix 2. Appendix 3 provides a complete table of hours by genre since 1988.

Drama / Comedy

First-run hours remained constant, with the increased broadcast by TV2 being offset by a decrease on TV One and a static result on TV3.

TV2 remains well ahead of both TV One and TV3 with *Shortland Street* continuing to dominate the TV2 drama output, with a daily first-run and repeat screening. A new 13 part series, *Street Legal*, debuted, a second series of *Jackson's Wharf* screened, and 2000 also saw the return of *Lawless* in one telefeature.

TV One's total hours were the lowest since 1992. *The Life and Times of Te Tutu* and *Nga Tohu: Signatures* comprised the only first-run drama/comedy on TV One.

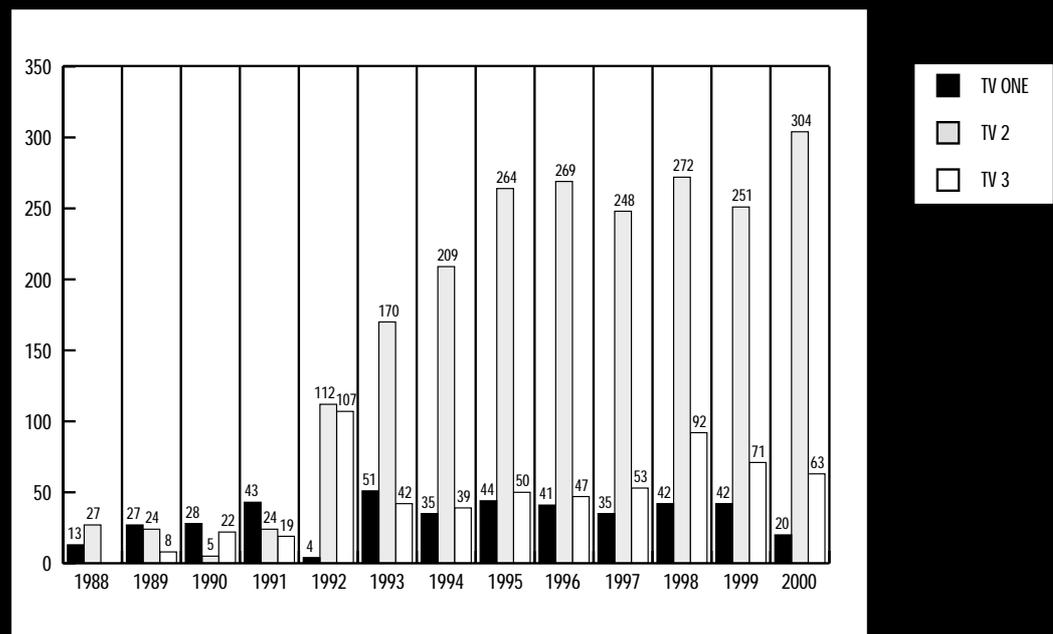
TV3 doubled its prime time drama/comedy hours but, as this was only a move from 5 to 10 hours, it did not make a significant difference to overall figures. *The Topp Twins* returned as did short film festival *Shortcuts*. One of the TV3 one-off dramas, *Staunch*, played in the *Inside New Zealand* slot. TV3 also slightly decreased the number of hours it repeated in this genre.

No new local Children's Drama screened on any of the networks, although one series is in production.

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

Fig 6

Total NZ drama hours by channel



Sport

Total sports coverage can fluctuate dramatically, largely affected by major international events such as the Olympic Games (2000, 1996 and 1992), Commonwealth Games (1990, 1994 and 1998) and the America's Cup. In 2000 both the Sydney Olympics and the America's Cup featured. Total hours leapt dramatically by 230 hours to 1239 hours.

Until this year TV One has traditionally screened the most sports programming. Despite the loss of rugby, cricket, some golf and tennis, TV One's Sports total dropped by only 32 hours, however, due to its coverage of the Olympics and America's cup.

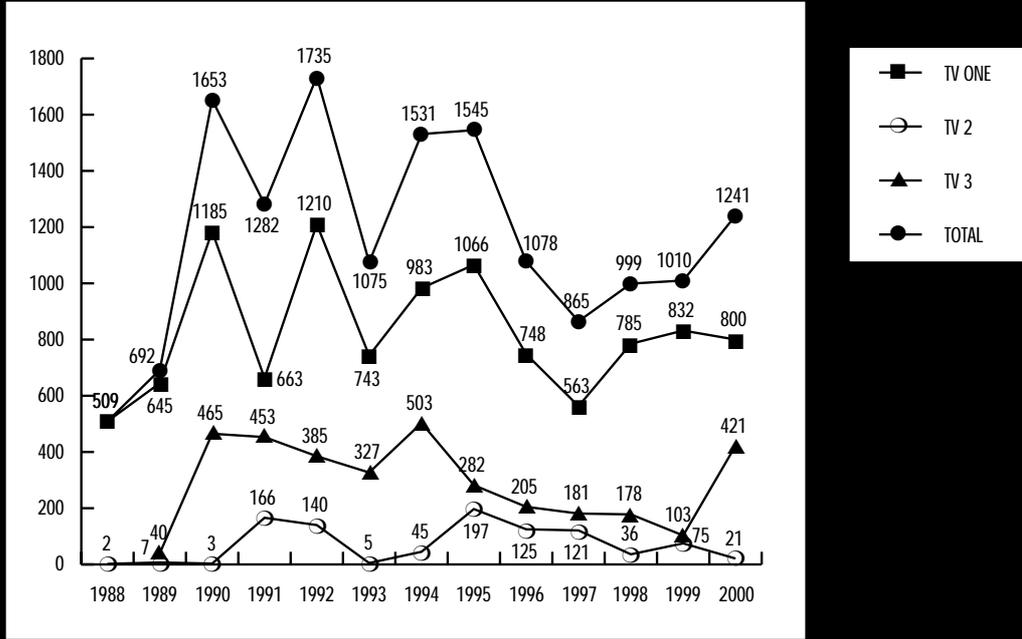
TV2's hours decreased by more than two thirds after the high caused by last year's World Netball Championships.

TV3's hours all but quadrupled with the regaining of cricket in the 1999/2000 summer and the gain of free-to-air rugby.

Sports hours are generally not funded by NZ On Air. An exception in 2000 was *Paralympics 2000*.

Fig 7

Total NZ sports hours by channel



News And Current Affairs

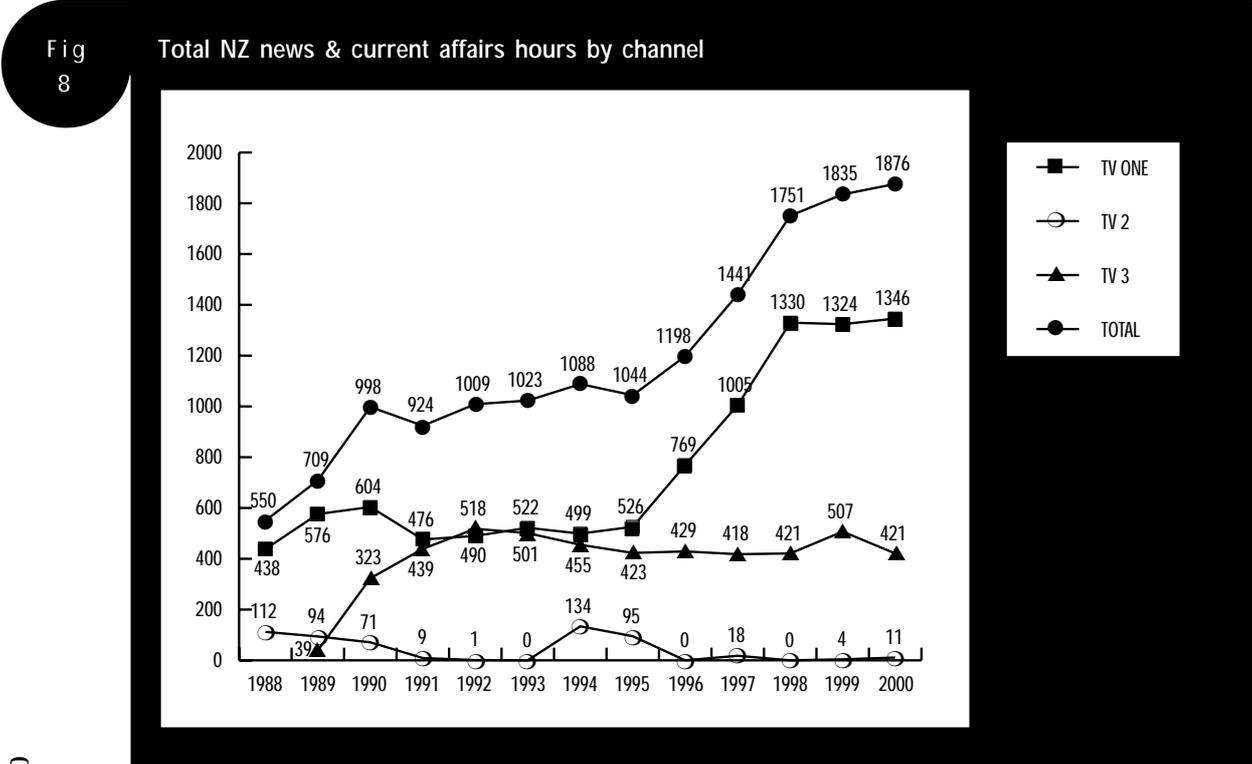
Figure 8, below, shows that there was a 41 hour increase in the total number of News and Current Affairs hours. However, this increase is mostly due to the inclusion of *60 Minutes* (28 hours) and *20/20* (at most 16 hours) in this genre for the first time. Previously they were recorded in this survey under Documentary. This year they have been moved to News and Current Affairs where they more properly belong. The apparent 41 hour increase is therefore actually a 3 hour decrease. This is the first time since 1995 that there has not been an appreciable increase in this genre.

TV One continued with its early morning *Breakfast* and *Telstra Business News*, which were first introduced in August 1997. The channel's staples continued to be the daily *One News* which ran for a full hour including weekends for most of the year, and the weekday *Holmes*, *Tonight* and *Midday*. *Assignment* and *60 Minutes* continued and a new series, *Face the Nation*, filled the space left by *Crossfire*.

TV3 continued with the daily *3 News* and *Nightline*. The channel also continued with its brief hourly *3 News Update*, which has been allocated at 8'30" per day (this production is not recorded in the *Listener*). The decline in hours recorded by TV3 was due to both the weekend bulletins moving to a half hour in duration, from previously one of one hour and one of half an hour.

TV2 continued its hourly *Newsbreaks*, screening two of one minute per day and the rest of 30 seconds.

This category is not funded by NZ On Air.



Entertainment

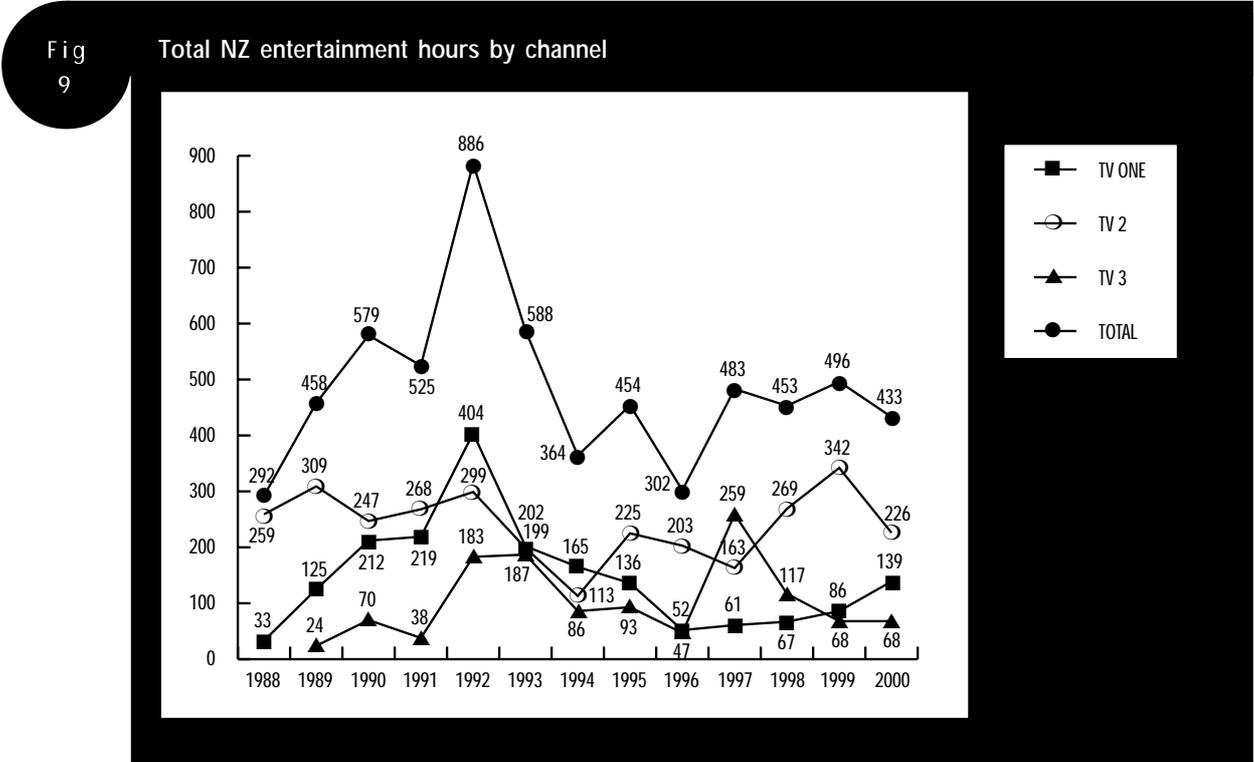
First-run hours decreased by 105 hours due mainly to the demise of *Ready Steady Cook* and the replacement of Friday night's *Ground Zero* with the shorter duration *Space*. Both of these programmes screened on TV2.

Despite these drops in hours TV2 continues to dominate this genre. Returning series included *Mitre 10 Dream Home*, *Squeeze*, *Video Hits Chart Show*, *Coca Cola RTR*, *Havoc 2000 Deluxe*, *The Great Kiwi Video Show* and *Strassman*. New series included *Can You Hackett?*, *Whose House is it Anyway?*, *Life on Tape*, *Shred*, *The Big Time*, *Treasure Island*, *The Mole*, and *Single Girls*.

TV One's increase in this genre was due mostly to a five-fold increase in repeat screenings from 12 hours last year to 62 in 2000. First-run hours remained relatively static with 77 hours in 2000 compared with 1999's 74. Returning series included *Telebingo* and *Tux Wonder Dogs*. One-off specials, ranging from perennials like the *Young Farmer Of The Year* and *This Is Your Life* to *The Maori Sports Awards*, made up the balance.

Total hours for TV3 in this genre remained static; 68 hours in 1999 and 2000.

Entertainment programmes are generally not funded by NZ On Air as they do not tend to require a subsidy to get made. Exceptions have included some performance-based series and youth series such as *Polyfest 2000*, *Space* and the *Billy T Awards*.



Children's

2000 saw a continuation of the decline in this genre that has followed since the high of 1265 hours recorded in 1992. This year a total of 591 hours of local Children's programming screened compared with 620 for 1999.

TV3 surrendered its position as the channel with the highest number of Children's hours. This was because of a large drop in the number of repeats which last year made up 87% of the total. This year repeats were down by 141 hours. However repeats still comprised 80% of TV3's total Children's hours. TV3's first-run hours were also down from 42 hours in 1999 to just 37 in 2000.

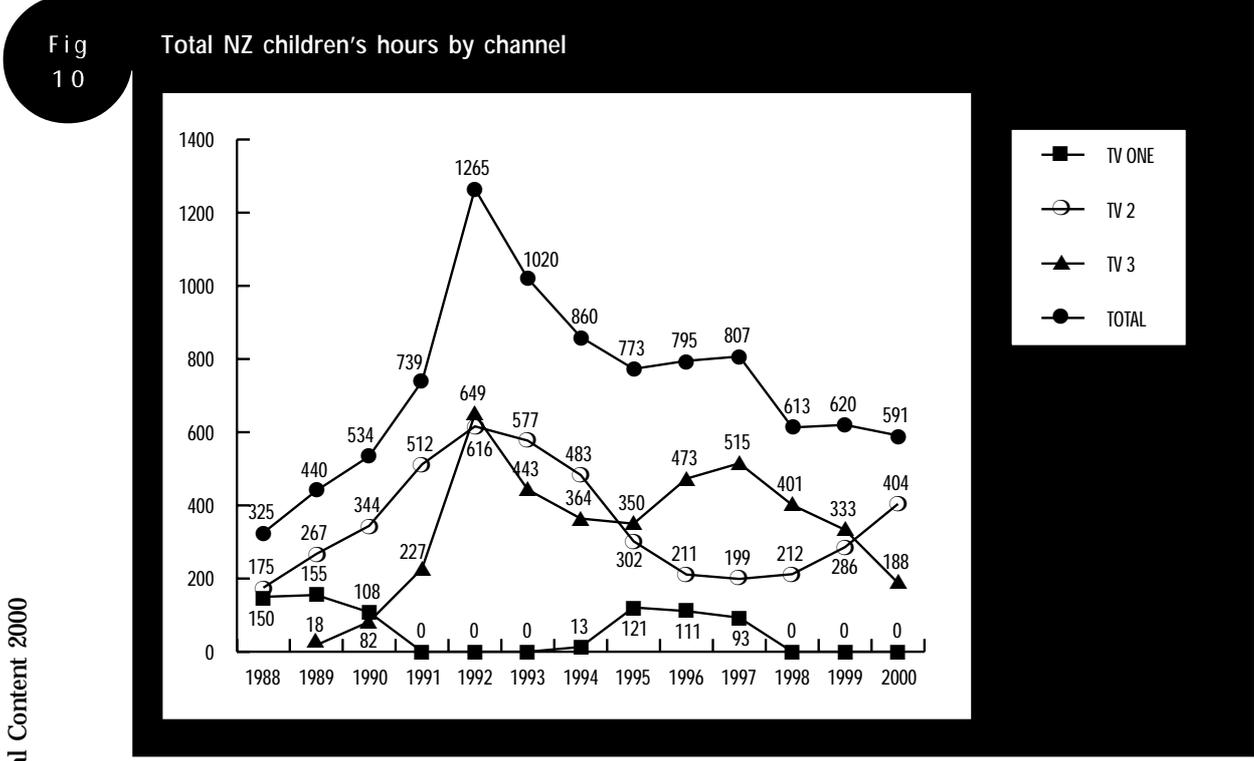
TV2 was by far the main provider of first-run local Children's programming, with 271 hours. This was an increase of 15 hours on 1999. TV2's total Children's hours also improved, largely because of a 102 hour increase in repeats. This brings TV2's repeats to 33% of their local content for children compared with 11% last year. This was due largely to the weekend repeat of *Bumble* in 2000.

It should be remembered that repeats are valid programming for younger children as most children's shows are designed to have a long shelf life so that they may serve the different emerging audiences.

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

The sole Children's Drama output for the year, on any channel, continued to be TV2's repeat of *Mirror Mirror*.

NZ On Air is the main contributor to Children's and Young Persons' programming. The only programme to screen in this genre which did not have NZ On Air funding was the repeat screening of *Buzz and Poppy*. NZ On Air provided \$10 million of funding for production of around 370 first-run hours in the 1999/2000 funding year. The overall reduction in Children's hours is directly connected to NZ On Air's funding constraints. Broadcasters will not commission this genre without substantial financial assistance.



Local Content 2000

Maori Programmes

Programming made predominantly by Maori for Maori (whether in Te Reo or English) rose dramatically in 2000, continuing an upward trend in recent years.

The three main ongoing programmes on TV One were *Marae*, *Waka Huia* and *Te Karere*. Boosting the hours were repeat screenings of the pre-school Maori programme *Tiki Tiki*, and a new summer season of *Marae*. These programmes all screened on TV One which continued to have by far the most Maori programming, with 241 hours, up 6 hours on 1999. The percentage of this content that was repeat decreased from 39% in 1999 to 32% in 2000. First-run hours on TV One increased by 19 to 163 hours.

TV2 continued with youth series *Mai Time*, and also screened *Maraerobics*. Although first-run hours dropped by 2 hours to 47, TV2 increased its total hours in this genre by repeats of *Mai Time* and a new summer contribution, *Mai Live* which, strictly speaking, also comprised repeat material.

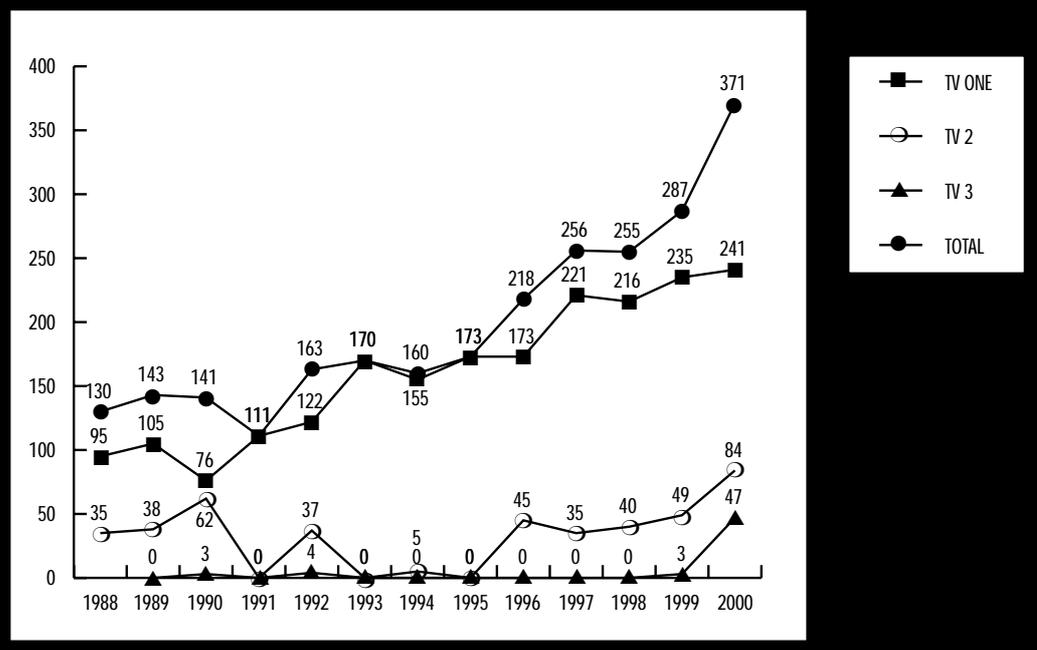
TV3's 52 week run of Te Reo children's programme *Pukana* was a major contributor to the increase in total Maori programmes. A new show, Te Reo university quiz, *Ihumanea* also added to the significant increase of first-run hours on TV3. TV3's first-run hours increased from 3 to 47 in 2000. TV3 screened no repeats in this genre.

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

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

Fig 11

Total Maori programmes by channel



Local Content 2000

Documentaries

Figure 12, below, shows a substantial decline in total Documentary hours of 89. However, this decline is mostly due to a peculiarity of this survey. Initially *60 Minutes* and *20/20* were allocated to the Documentary category. This year, for the first time, they have been reallocated to News and Current Affairs where they more properly belong. Similarly, *Tagata Pasifika* (26 hours) was also moved from this genre to Information to more closely align it with the other Special Interest programmes recorded in that category. In total, these programmes account for 70 hours of the recorded decline so the net decrease is only 18 hours.

For TV One, once we adjust for the effect of removing *60 Minutes* (28 hours) and *Tagata Pasifika* (26 hours), the actual hours of Documentary on TV One have increased by 23. Similarly for TV3, the survey shows a reduction of 37 hours. Once we adjust for the removal of *20/20* (almost 16 hours) the actual decrease is only 31 hours.

In terms of total hours TV2 pulled back from 1999's all-time high by 10 hours to 42. This was due to a reduction in prime and offpeak hours.

The number of repeat hours on TV One remained relatively constant, but offpeak screenings of documentaries decreased from 30 hours in 1999 to 6 in 2000. Repeats on TV2 remained constant. Repeats on TV3 halved.

TV One continued its dominance of this genre. New series on TV One in 2000 included *Service with a Smile*, *Private Investigators* and *Going, Going, Gone*. Returning series included *Location, Location, Location* on the real estate business, reality series *The Zoo*, also *Epitaph* and *Country Calendar*. *Documentary New Zealand* entered its third year, but at 25 hours not 30. This decrease was caused by constraints in NZ On Air funding. Offpeak screenings of natural history repeats also featured in the schedule.

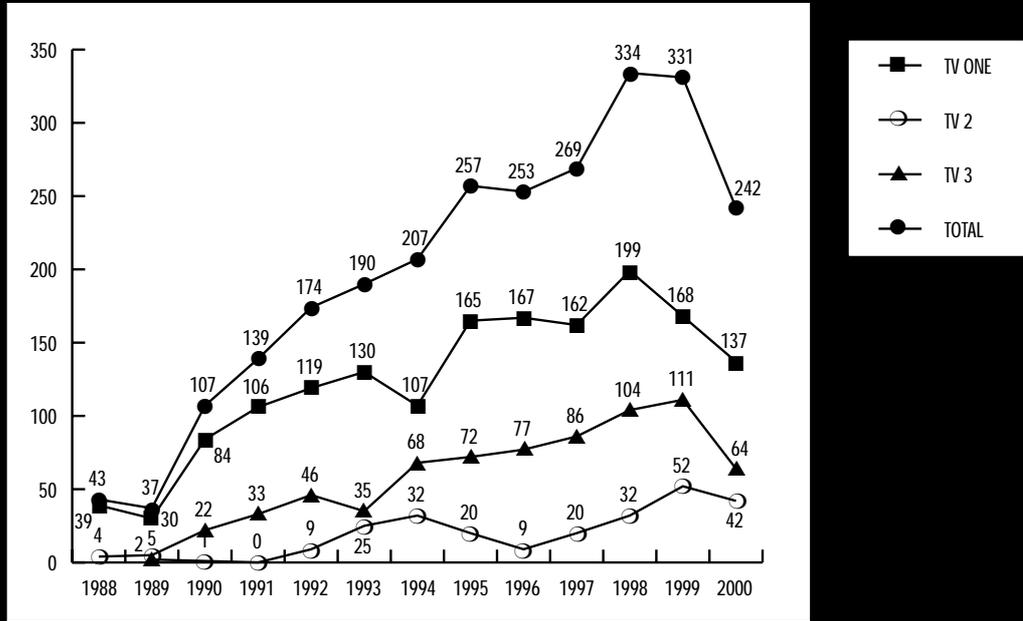
TV2 introduced *The \$20 Challenge*, *Rescue One*, *Dream Jobs* and *Towies* as well as some one-off specials such as *Dope: Behind the Smoke*, *kiwiflatmates.com* and *Police Special: Operation Bouma*. Returning series included *Weddings* and *Motorway Patrol*.

TV3's output dropped with a shorter run of *Inside New Zealand*, again due to NZ On Air funding constraints. TV3's new series in this genre were *The Big OE*, *Rafted* and *Wild About New Zealand*. Repeats more than halved from 49 hours in 1999 to 24 in 2000.

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

Fig
1 2

Total NZ documentaries by channel



Information

This genre experienced an overall decline of 150 hours. This reduction is mostly due to a big decrease in repeats on TV2, specifically the cancellation of the TV2 repeat of *Good Morning*, which originally screened on TV One and any repeat of the Jude Dobson vehicle *Five O'Clock With Jude Dobson*. Only 14% of the total Information hours for 2000 was comprised of repeats compared with 38% in 1999 and 51% in 1998.

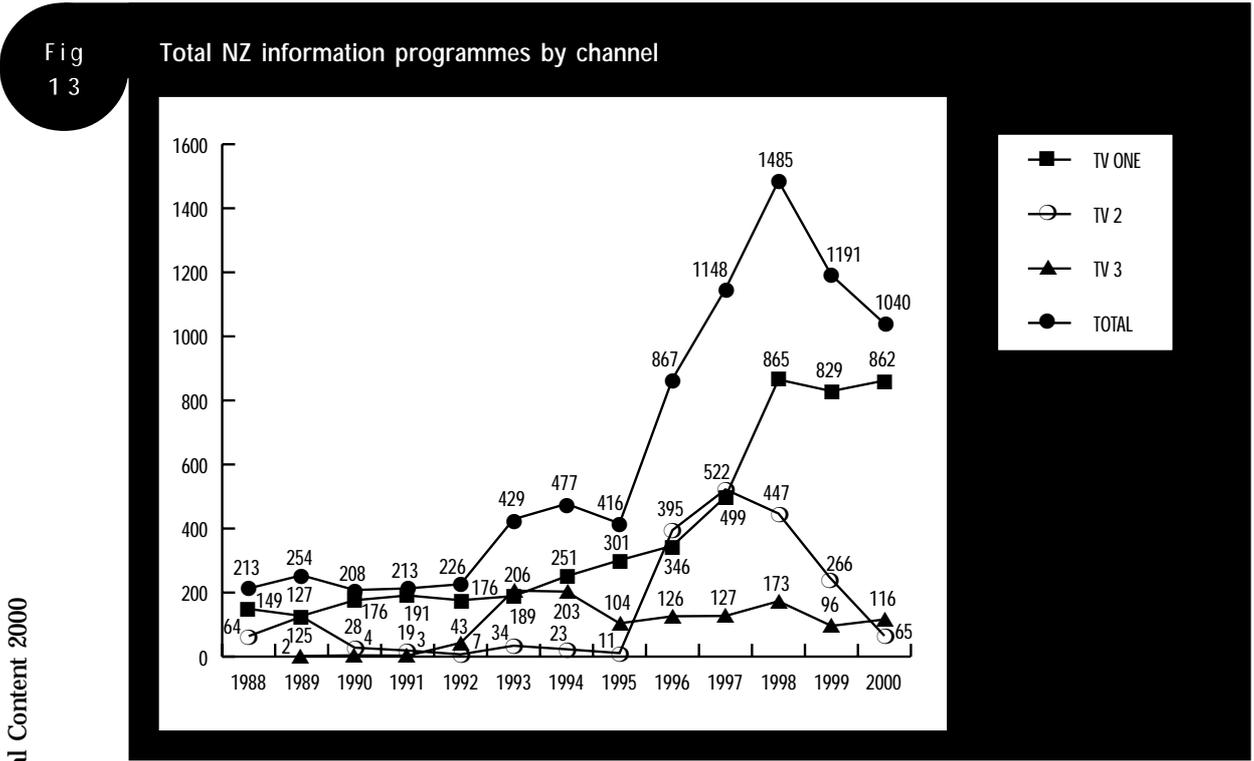
In 2000 first-run hours grew significantly on TV One, which increased offpeak screenings in this genre by 111 hours. This is partly due to the reallocation of *Tagata Pasifika* to Information from Documentary; to more properly align it with the other special interest programmes in this category. The increase on TV One was mainly due, however, to *Today Live* which screens for a half-hour every day, outside of prime time. TV One prime time hours rose by 11 to 94 hours. New series included *Today Live*, *Jim's Car Show* and *Money Doctor*. Returning prime time series included *Unichem Medical File*, *Home Front*, and *Corban's Taste New Zealand*, the New Zealand inserts for *United Travel Getaway*, *Maggie's Garden Show*, and *Fair Go*.

Offpeak returning series included arts and issues series *Backch@t*, Christian series *Praise Be*, *Asia Dynamic*, and *Inside Out* for people with disabilities. *Fish*, featuring music for young Christians and *Bookenz*, for bibliophiles, also returned. The daily semi-infomercial series *Good Morning* remains the main contributor to TV One's offpeak first-run hours.

TV2 increased its prime time information hours by 17 to 23 hours. New TV2 titles in this genre were *It's Your Money*, *The Money Game* and *Love That Car*. Returning series were *My House My Castle*, with *Queer Nation* screening offpeak.

TV3's total hours increased by 20. Consumer issues series *Target* continued, along with another returning series, *Gone Fishing*. New series included *Mazda Outdoors*, *Hot Property* and the new rural show *No. 8 Wired*. Prime time hours were down 5 to 25 in 2000, repeats were up by 6 hours and *No.8 Wired* increased offpeak hours by 19 to 32.

NZ On Air funds some programmes in this category, mostly Special Interest programming such as *Asia Dynamic* (now "Asia Down Under") and *Tagata Pasifika*.



Local Content 2000

Non-National Channels

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

Figures are attached as Appendices 7, 8 and 9.

Free To Air

TV4's percentage of local content increased to 5.3% from 3.5% in 1999. Its prime time first-run programmes increased to 52 hours, approaching 1998's high of 63 hours, due mainly to the introduction of *Most Wanted*. Other first-run series included *Xsport*, *The Vodaphone Surf Show*, *Smokefree Rockquest* and short film festival, *Shortcuts*. First-run offpeak programming plummeted due to the move of Maori language series *Pukana* to TV3. Repeats more than doubled and comprised reruns of popular youth series *Ice As*, stand-up comedy series *Pulp Comedy*, and a season of classic New Zealand films.

For the purposes of this survey Prime is considered as one channel, despite its technical structure of five regional channels, because the majority of its output is networked. Its local content dropped from 987 hours, or 23%, to 653 hours or 14%. This local programming largely consisted of the predominantly infomercial series *Prime Living* and *Prime Sport Specials*. *Prime Living* was also repeated, meaning just over one third of the channel's output comprised repeats.

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

TV4 Hours

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

Prime TV Hours

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

Sky Television

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

- Sport (Sky Sport) screened over 1600 hours or 19% (15% in 1999)
- Discovery has virtually no local content apart from the occasional documentary. Trackside, the TAB racing channel which shares time with the Discovery channel, has approximately 90% local content and screens around 2000 hours of racing a year
- CNN increased its local output slightly from 415 hours in 1999 to 443 in 2000. These hours are the repeats of TV3's *3 News*, and the Current Affairs series *Leighton Smith Live*
- HBO Movies screens the occasional New Zealand feature film and documentary
- Other Sky channels have not been measured since the introduction of Sky's digital service because they do not carry significant levels of local content and are not listed in the *Listener*

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

Regional Channels

Since this survey began there has been a burgeoning of smaller regional and community channels. At least 17 such channels now operate, from the far North to Invercargill, claiming a potential audience of 2,664,500. Recently a new organisation, the New Zealand Regional Television Broadcasting Group (NZRTBG) was formed to represent their interests. These stations may operate under commercial or non-commercial licences but the NZRTBG maintains that the key point which they have in common is that they are able to meet the viewing demands of that part of the population whose viewing requirements cannot be met on a national basis.

The NZRTBG submits that its members screen in excess of 8,000 hours of locally-made or provided programmes, 3000 hours of which are repeats. Of the first-run content the distinction between locally-provided and locally-made, is important. A locally-provided programme is one purchased from overseas by a local community group, with broadcast time then purchased from the local channel. A locally-made programme is just as it sounds.

The Chairman of the NZRTBG says that of the 5,000 first-run hours claimed, two thirds would be locally-made and one third locally-provided. At this stage, obtaining an accurate breakdown of these hours for direct comparison with the other figures, is beyond the scope of this report. This is something we will look into in the coming year.

Notes:

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

Notes On Methodology

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

9. The categories are:

Drama/Comedy

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

Sports

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

News and Current Affairs

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

Entertainment

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

Children's

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

Children's Drama

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

Maori Programmes

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

Documentaries

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

Information

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

Appendix 2

Local Content Report For All Programmes Screened Year 2000

Category:	TV One				TV2				TV3			
	Prime	Repeat	Offpeak	Total	Prime	Repeat	Offpeak	Total	Prime	Repeat	Offpeak	Total
Information	94.17	70.33	697.00	861.50	23.00	19.50	20.00	62.50	24.50	59.00	32.00	115.50
Documentaries	85.50	46.00	5.25	136.75	35.50	4.50	1.50	41.50	39.00	24.00	1.00	64.00
Maori Programmes		78.25	163.00	241.25		37.00	46.50	83.50			46.67	46.67
Children's Drama						5.50		5.50				
Children's						133.08	270.75	403.83	5.00	150.50	32.00	187.50
Entertainment	48.83	61.92	28.08	138.83	56.17	20.83	149.17	226.17	11.50	37.17	19.50	68.17
News/Current Affairs	535.00		811.58	1,346.58			10.75	10.75	353.17		165.17	518.33
Sports	41.75	38.42	719.50	799.67		1.00	19.50	20.50	87.00	12.17	322.08	421.25
Drama/Comedy	3.50	15.00	1.00	19.50	155.00	136.83	12.08	303.92	9.50	53.00		62.50
Totals	808.75	309.92	2,425.42	3,544.08	269.67	358.25	530.25	1,158.17	529.67	335.83	618.42	1,483.92
Total New Zealand Broadcast Time:	3,544.08				1,158.17				1,483.92			
Total Broadcast Time:	8,784.00				8,784.00				8,784.00			

N.Z. Content Percentage of Total Broadcast Time: 9.2% 3.5% 27.6% 40.3% 3.1% 4.1% 6.0% 13.2% 6.0% 3.8% 7.0% 16.9%

All Three Channels

Total New Zealand Prime Time:	1,608.08	Total Prime Time:	4,392.00	N.Z. Content Percentage of Total Prime Time:	36.6%
Total New Zealand Repeat Time:	1,004.00	Total Repeat Time:	26,352.00	N.Z. Content Percentage of Total Repeat Time:	3.8%
Total New Zealand Offpeak Time:	3,574.08	Total Offpeak Time:	21,960.00	N.Z. Content Percentage of Total Offpeak Time:	16.3%
Total New Zealand Broadcast Time:	6,186.17	Total Broadcast Time:	26,352.00	New Zealand Content Percentage:	23.5%

Total NZ Hours By Genre 1988 - 2000

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

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