

NZ On Air Public Information and Opinion Monitor

Prepared for:



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1.0 Executive Summary

NFO New Zealand has conducted the NZ On Air public information and opinion monitor annually since 1992. From 1999 all reference to the Broadcasting Fee was removed from the survey. This year new questions were added to the survey to measure awareness and understanding of the new Maori television channel and the NZ On Air charter as well interest in New Zealand made arts and performance programmes.

Telephone interviews were conducted with n=750 randomly selected people from throughout New Zealand. An additional, n=220 interviews were conducted with Pacific Peoples selected from the panel of potential Lifestyle and Opinions survey respondents and through networking.

The following summary of results focuses on the main sample n=750 to allow comparability with previous years. Following this are comparisons between all Pacific Peoples (booster and main sample) and non Pacific Peoples from the main sample.

1.1 Main Sample

Awareness of NZ On Air

- In 2003, nine in ten people surveyed (91%) were aware of NZ On Air. This was a significant decrease from the previous seven years and is the same result as in 1995.
- As in previous years, the spontaneously mentioned main function of NZ On Air is funding New Zealand programmes (26%). Significantly more people in 2003 (from previous years) said NZ On Air funds broadcasting (12%) and promotes New Zealand made programmes (9%). Significantly fewer people said NZ On Air funds programming for TV and radio, or that it makes TV and radio programmes.
- Once prompted, the majority of people thought the main functions of NZ On Air were to fund NZ made TV programmes (89%), to promote NZ culture and identity (80%), to promote Maori language and culture (78%) and to provide a wider range of NZ television than would otherwise be the case (78%).
- Significantly more people thought NZ On Air was a part of TVNZ in 2003 (46% compared with 40% in 2002). This increase may in part be due to the introduction of the Television New Zealand charter.
- Significantly more people thought NZ On Air was part of Radio NZ compared with 2002 (44% compared with 38% in 2002).

NZ On Air Content

- Positively, the majority of people agreed that NZ On Air supports programmes and activities that are important to New Zealanders (80%). High numbers also agreed that seeing ourselves on television and hearing our stories helps to develop our cultural identity (78%) and that without NZ On Air NZ drama, documentary and children's programmes would disappear (76%).
- There has been a significant increase in peoples' positive attitudes towards NZ On Air since 1999. Specifically, over three quarters of New Zealanders agreed with the statements that 'NZ On Air supports programmes and activities that are important to New Zealanders' (80%), 'seeing ourselves on television and hearing our stories helps to develop our cultural identity' (78%) and 'without NZ On Air New Zealand drama, documentary and children's programmes would disappear' (76%).

New Zealand Made Arts and Performance Programmes

- Six in ten people (60%) were unable to spontaneously recall any New Zealand made arts or performance programmes. The most commonly recalled programmes were Mercury Lane (4%), World of Wearable Art Awards (3%), The Big Art Trip (3%) and Tagata Pasifika (3%).
- Two fifths (41%) of people were interested in New Zealand made arts and performance programmes while over a quarter (28%) were disinterested. Twenty nine percent were neither interested nor disinterested in arts and performance programmes.
- A similar proportion to those interested in New Zealand made arts and performance programmes said they would be likely to watch them (39%). A third of people (31%) said they were unlikely to watch arts and performance programmes.
- The most popular New Zealand made arts and performance programmes that people would like to see was coverage of concerts or events (58%). Magazine style programmes (47%) were also popular. People would be least interested in seeing reality or entertainment based programmes with a competitive element (39%).
- Around two thirds of respondents agreed that New Zealand made arts and performance programmes are a good source of information (65%) and are well made and of a high quality (62%). Only a fifth of people thought New Zealand arts and performance programmes were boring (20%) or too serious (19%).

Use of NZ On Air Funding

- Three in ten New Zealanders (29%) think NZ On Air helps buy TV programmes made overseas. Four in ten (41%) think that NZ On Air does **not** buy programmes made overseas.
- More people still believe that NZ On Air funds Shortland Street (21%) than any other programme. However the number of people who thought this in 2003 was down significantly compared with 2002. What Now? has the highest spontaneous awareness out of the programmes that NZ On Air does fund (12%). Sticky TV (8%), National Radio (7%) and Street Legal (7%) were also among the top New Zealand programmes to be spontaneously mentioned by respondents.
- The majority of people still tell a programme is funded by NZ On Air by the logo at the end of the programme (63%). This is similar result to previous years. Comparatively smaller proportions of people could tell a programme was NZ On Air funded by the logo at the beginning of a programme (8%) or from information in the Listener/TV Guide advertisements (5%).
- The majority of people believe that NZ On Air should fund:
 - teletext subtitles on TV (83%)
 - television and radio reception for remote communities (83%)
 - in-depth NZ documentaries on TV (82%).

There is less support for NZ On Air to fund Pacific Island radio stations in New Zealand (44%) or NZ programmes for minorities (45%).

Compared with 2002, significantly more people think NZ On Air should fund in-depth documentaries on TV, while there was a drop in support for funding of National Radio and Concert FM, documentaries about Maori, arts and performance programmes, Maori radio and television in Te Reo and NZ programmes for minorities.

- New Zealand documentaries remained the most preferred type of New Zealand made programme people would like to see funded by NZ On Air if they had additional funding (17%), a similar result to previous years. Significantly more people would like to see more New Zealand music (9%) and a similar proportion of people would like more New Zealand drama (8%) compared with previous results.

New Zealand Television

- Similar to 2002, a fifth of people (21%) correctly perceived that New Zealand made television programmes make up between 16 and 25 percent of programmes shown on television. Three in ten people (30%) each either underestimated (0-15 percent) or overestimated (26-50 percent) the amount of New Zealand made programmes.
- Once told that around 24 percent of programmes shown on television are New Zealand made, 60 percent of people felt that the amount of New Zealand local content on television should increase (similar to 2002). As per 2002, only three percent of people felt that the amount of local content should decrease while a third (33%) felt it should stay the same.

- Once told that the level of local content in Australia is 55 percent, United Kingdom is 75 percent and US is over 90 percent, significantly more people (69%) then said the amount of New Zealand local content should be increased. These results are similar to those in 2002.
- The majority of respondents agreed that free to air television should be made to screen a set amount of New Zealand made programmes, particularly documentaries (87%), children and young persons programmes (84%), all programmes in general (82%) and special interest programmes (81%). These are significant increases from 2002 (when this question referred to a minimum amount rather than a set amount).
- Once told that it is more expensive to buy never seen before New Zealand programmes than to buy ready made overseas programmes, significantly fewer (76%) said free to air television should be made to screen a set amount of New Zealand made programmes.

Television Viewing and Radio Listening Behaviour

- Over half of people surveyed (55%) thought the amount of New Zealand music being played on the radio has increased. Only four percent thought it had decreased. This was a similar result to 2002.
- Two thirds of people think it is important that radio stations are encouraged to play more NZ music and that more New Zealand music is played on the radio. Again, this was a similar result to 2002.
- New Zealand documentaries continue to be clearly the most watched programmes among New Zealand households (91%). The next most watched included New Zealand drama (64%), comedy (63%) and special interest programmes (62%). Interestingly, with the exception of New Zealand documentaries, all other types of New Zealand made programmes were watched or listened to by significantly more households than in 2002.
- There are four distinct groups of television watchers and radio listeners that tend to watch similar genres of programmes: Special Interest Groups, TV Watchers, Muso's and Radio Heads. TV Watchers make up the largest group being those who tend to watch NZ comedy, documentaries, special interest programmes, arts and performance and drama programmes.
- Over half of people surveyed (56%) said they would watch Maori programmes in Te Reo if they had English subtitles.
- Inside New Zealand and Documentary New Zealand remain the two most watched NZ On Air funded programmes among New Zealanders (89% and 88% respectively). Not surprisingly, they were also the most enjoyed (85% and 86% respectively).
- The next most watched New Zealand made programmes were What Now? (65%) and Colonial House (63%).

- 'One off' programmes, although watched by relatively small numbers of people had a relatively high level of enjoyment, e.g.:
 - Our New Zealand – watched by 48%, enjoyed by 79%
 - Mobil Song Quest – watched by 44%, enjoyed by 77%
 - Gang Girls – watched by 23%, enjoyed by 72%
 - World of Wearable Art Awards – watched by 49%, enjoyed by 70%
- Documentary NZ, Inside NZ, What Now?, Colonial House, Street Legal, Spin Doctors, World of Wearable Art Awards, Pulp Comedy, Our New Zealand and Mercy Peak were all programmes watched and enjoyed by over 45 percent of New Zealanders.
- There are three groups of programmes that are similar and watched by the same group of people. These groups can be classified as Youth, 'TV One' Viewers and Special Interest Viewers. Looking at the likeability of the programmes that these groups tend to watch, suggests that NZ On Air does not cater as successfully to the youth market with these groups rating the shows they watch lower than the TV One Viewers or the Special Interest Viewers.

Maori Television

- Just under three quarters of people (71%) were aware of the plans for a new Maori television channel. Europeans were significantly more likely to be aware of the plans than other ethnicity's.
- Just under a quarter (23%) of those aware of the new Maori channel think the key role of it is to promote Te Reo Maori. A similar number think the key role is to broadcast Maori interest programmes. Three in ten people (29%) did not know what the key role of Maori television was.
- Four in ten people (40%) rated the Maori channel as either 'very' (22%) or 'quite' important. However, a similar number (37%) rated it as 'very' (25%) or 'quite' (12%) unimportant.
- Almost half of people (45%) want all or the majority (i.e. between 76-100%) of the programmes shown on Maori television to be in English or to have English subtitles.
- A quarter of people (24%) said they would be likely to watch the Maori channel with only 12 percent being 'very likely' to. The majority said they were unlikely to watch, with 39 percent of people saying they would be 'very unlikely'.

TVNZ Charter

- Just under a half of people surveyed (45%) were aware of the TVNZ charter. This is a significant increase in awareness since 2001 (when the charter was first designed by Government).
- The main perceived change in television as a result of the charter was that more programmes were New Zealand made (16%). This is similar to the proportion of people who expected the charter would increase the amount of New Zealand made programmes in 2001 (18%). Nine percent of people said there are now better quality programming. However, 46 percent of people were not aware of how the charter has changed television and a further 19 percent felt there had been no change to date.
- Once prompted, just under a half of people agreed that as a result of the charter there had been more programmes reflecting the diversity of New Zealand (48%), more local programming overall (47%) and more programmes that include Maori elements (44%). Only 12 percent felt that the charter had resulted in fewer advertisements and 19 percent said that the charter had not changed anything. These are all significant decreases from the expected changes reported in 2001.

1.2 Pacific Peoples Compared to Non Pacific Peoples Results

This section summarises the significant differences between the Pacific Peoples sample and the non Pacific Peoples sample.

- Pacific Peoples were significantly **more** likely to:

	Pacific Peoples %	Non Pacific Peoples %
Think NZ On Air was part of TVNZ	67	46
Think NZ On Air was part of Radio NZ	44	38
Be aware that NZ On Air:		
- helps provide TV and radio reception to remote communities	58	41
- promotes NZ music, for example, by funding NZ music videos	80	69
- helps fund Access radio stations	54	39
- provides teletext subtitling on some TV programmes for people who have difficulty hearing	59	48
- helps fund radio stations for the Pacific Island community in NZ.	65	43
Agree that:		
- NZ On Air only funds programmes that do not interest me	58	48
- It is important that NZ On Air made programmes are shown in new broadcasting systems like Pay TV, digital TV and Internet	26	15
Be spontaneously aware of:		
- Tagata Pasifika	14	2
- Showstoppers	6	1
Be interested in arts and performance programmes	55	40
Be specifically interested in:		
- cultural performance or events	86	43
- talent quests	72	42
- music video based programmes	72	43
- Reality or entertainment based programmes with a competitive element	56	38
- Variety performance programmes like live studio shows	54	41
Be likely to watch arts and performance programmes	54	39
Agree that arts and performance programmes are:		
- a good source of entertainment	67	48
- enjoyable to watch	65	55
- important to me	54	39
- screened at a time that is convenient to me	46	36
Think that NZ On Air buys programmes made overseas	45	29

	Pacific Peoples %	Non Pacific Peoples %
Know that a programme is funded by NZ On Air by the logo at the end of the programme	78	62
Rate the following NZ On Air services as important:		
– programmes for ethnic minorities	86	55
– New Zealand music	83	77
– Pacific Island radio stations in NZ	83	43
– Children's programmes reflecting Maori language and culture for all children	72	63
– Maori radio and television in English	66	58
– Access radio stations	63	48
– Maori radio and television partly in Te Reo.	55	46
Not know what NZ On Air should fund	38	22
Think that between 51-100 percent of programmes shown on TV are NZ made	16	4
Think the amount of local content on television should decrease	7	3
Think the amount of NZ music on the radio has increased	67	56
Think it is important that radio stations are encouraged to play more NZ music and that more NZ music is played on the radio	73	66
Watch or listen to:		
- children's programmes	87	55
- teletext subtitles	46	35
- Access radio stations	42	25
- Maori radio stations and TV programmes both in Te Reo and Maori,	32/54	24/40
- Pacific Island radio stations	83	14
- music	47	32
- student radio stations	40	23
Think it is important that NZ has a Maori television channel	48	39
Think that between 35 and 50 percent of programmes on the Maori channel should be English or with English subtitles	28	18
Think it is 'very likely' that they will watch programmes broadcast on the Maori channel	20	11
Agree that the TVNZ charter has resulted in:		
- better television overall	47	32
- television is more enjoyable	45	28
- fewer adverts	26	12

- Pacific Peoples were significantly **less** likely than non Pacific Peoples to:

	Pacific Peoples %	Non Pacific Peoples %
Be aware of NZ On Air	87	92
Think the role of NZ On Air was to:		
- fund NZ made programmes	17	26
- policing and censorship and maintaining standards	3	7
- delivering top quality programmes	*	3
Agree that without NZ On Air a lot of NZ arts and performance programmes would disappear	67	74
Agree the following NZ On Air services are important:		
- in-depth documentaries on television	70	83
- television/radio reception for remote communities	68	83
Think that NZ On Air should fund:		
- documentaries	5	18
- music	5	18
- drama	4	8
To be aware of the new Maori television channel	39	71
To be aware of the TVNZ charter	21	46

1.3 Conclusions

Awareness of NZ On Air remains high, with nine in ten New Zealanders saying they were aware of NZ On Air. There is however increasing confusion about the role of NZ On Air with an increase in those perceiving that NZ On Air is part of TVNZ or Radio NZ.

NZ On Air Content

There is a general increasing trend in peoples' positive attitudes towards NZ On Air, with significantly more people recognising the positive impact NZ On Air has on broadcasting in New Zealand since 1999.

New Zealand Made Arts and Performance Programmes

For the first time in 2003, New Zealand households were asked about their awareness of and interest in New Zealand made arts and performance programmes. Awareness of specific arts and performance programmes is relatively low, with four in ten New Zealanders able to recall at least one New Zealand made arts or performance programme.

A similar proportion to those aware of at least one art and performance based programme said they were interested in and likely to watch these types of New Zealand made arts and performance programmes. When prompted, people were most interested in seeing coverage of concerts or events and magazine style programmes.

Use of NZ On Air Funding

There still remains some confusion about what specific programmes NZ On Air funds. The majority of people said they can tell a programme is funded by NZ On Air by logo that appears at the end of the programme.

When asked what areas of broadcasting NZ On Air should fund, a high proportion of New Zealanders indicated that NZ On Air should fund in-depth documentaries on television (one of the top three areas of broadcasting considered important among New Zealand households).

New Zealand Television

In general, people feel that the current local content screened on television is not enough, with the vast majority of New Zealanders saying local content should increase.

People think most New Zealand made genre should have a set amount of television airtime (between 87 percent for New Zealand made documentaries and 71 percent New Zealand made comedy programmes). This is a significant increase on 2003 (when this question referred to a minimum amount rather than a set amount).

Television Viewing and Radio Listening Behaviour

Similar to 2002, New Zealand documentaries are the popular local programmes for New Zealand households. Inside New Zealand and Documentary New Zealand being the two most watched New Zealand made programmes on television. Interestingly, with the exception of New Zealand documentaries, significantly more New Zealand households regularly watch or listen to all other types of New Zealand made programmes in 2003.

The results identified three distinct markets based on their watching behaviour, using factor analysis. These segments were named Youth, 'TV One' Viewers and Special Interest Viewers. People within the Youth market tended to rate their enjoyment of the shows they watch lower than TV One Viewers and Special Interest Viewers. This suggests a potential target area.

Maori Television

In general, awareness of the plans for a new Maori television channel is relatively high among New Zealanders. However, less than half said it was important to have a Maori television channel, and a quarter said they were likely to watch programmes broadcast on the Maori channel.

TVNZ Charter

- More than half of people were unaware of the TVNZ charter. This is a significant increase in awareness since 2001. When prompted about the charter, the main perceived change in television was that there had been more programmes reflecting the diversity of New Zealand and more local programming overall. However, this is significant decrease from the expected changes reported in 2001.

Comparisons Between Pacific and Non-Pacific Peoples

Similar to 2002, Pacific Peoples were significantly less likely to be aware of NZ On Air and were more likely to think that NZ On Air is a part of TVNZ or Radio NZ.

Pacific peoples were also more likely to say that they can tell a programme is funded by NZ On Air by the logo that appears at the end of the programme, and significantly more Pacific Peoples used this as an indicator in 2003 compared to 2002.

Pacific Peoples are more likely than non-Pacific Peoples to be interested in and to watch arts and performance programmes, with the majority of Pacific Peoples having a particular interest in programmes about cultural performance and events, talent quests and music video based programmes.

When prompted about the planned introduction of the Maori television channel, Pacific Peoples were more likely than non-Pacific Peoples to say they would watch programming on the planned Maori television channel. However, Pacific Peoples were **less** likely to be aware of the plans for a Maori television channel. This highlights an opportunity to increase interest in and future viewing of the Maori television by increasing awareness of the plans to introduce the new Maori television channel.

2.0 Background

NFO New Zealand has conducted a public information and opinion monitor for NZ On Air since 1992. From 1999 all reference to the Broadcasting Fee was removed. Where applicable, respondents are asked about NZ On Air instead of the Fee. Objectives of the research are to:

- Measure awareness of NZ On Air.
- Determine the level of understanding of the role and functions of NZ On Air.
- Determine awareness of how NZ On Air funding is used.
- Gain feedback on the amount of “local” New Zealand made programmes that should be on television.
- Measure support for compulsory broadcasting of New Zealand made programmes on free to air television.
- Gather feedback on the importance of the role NZ On Air plays in New Zealand broadcasting.
- Gather feedback on the preferred use of NZ On Air funding.
- Gather feedback on the use of any extra funding made available.
- Measure popularity and awareness of programmes funded by NZ On Air.
- Identify any differences between the responses of Pacific people and non-Pacific people.
- Measure television watching and radio listening behaviours.
- Measure interest in English subtitles on Maori programmes in Te Reo.
- Determine the level of support for NZ On Air’s programmes and services.
- Gather views on whether Maori and Pacific culture are reflected adequately in television and radio, and how important this is.

In 2003, the research also measured awareness of, and interest in, Arts and Performance programmes on television.

3.0 Methodology

The main sample of n=750 respondents were recruited using random digit dialling. The margin of error associated with a sample of n=750 is +/-3.6%. On reduced base sizes the sample error will be greater than this.



In addition, a booster sample of n=220 Pacific Peoples were recruited from the panel of potential Lifestyle and Opinions survey respondents and through networking. Additional to the booster sample of n=220 Pacific Peoples, a further n=28 Pacific Peoples were interviewed as part of the main sample. This gave a total of n=248 Pacific Peoples, with the remaining n=722 interviews (n=750 less the n=28 Pacific Peoples) being classified as non-Pacific Peoples.

Sample

- The person surveyed was the person within each household who was aged 18 years or over.
- The main sample was geographically representative of the main urban, secondary urban and rural centres (100% national coverage).
- From 1997 the sample was extended to include rural households.
- The sample profile can be found in the appendix. As occurred in previous years, females (63%) were more likely than males (37%) to participate in the survey.

Interviewing

- Fully trained NFO New Zealand interviewers based in Auckland carried out the interviewing. This survey was conducted using Computer Assisted Telephone Interviewing (CATI).
- Up to three callbacks were conducted to reduce over-sampling of less socially active people.
- To ensure the quality of information, all interviewers' work was checked for accuracy and completeness by a supervisor. In addition, a 10 percent audit of each interviewer's work was undertaken.
- Fieldwork was conducted between 28 May and 23 June 2003. All interviewing was conducted during weekends and weekday evenings.
- A structured questionnaire was used for the survey. The questionnaire is appended to this report.

NB: Circles  indicate where results are significantly higher. Squares  indicate where results are significantly lower.

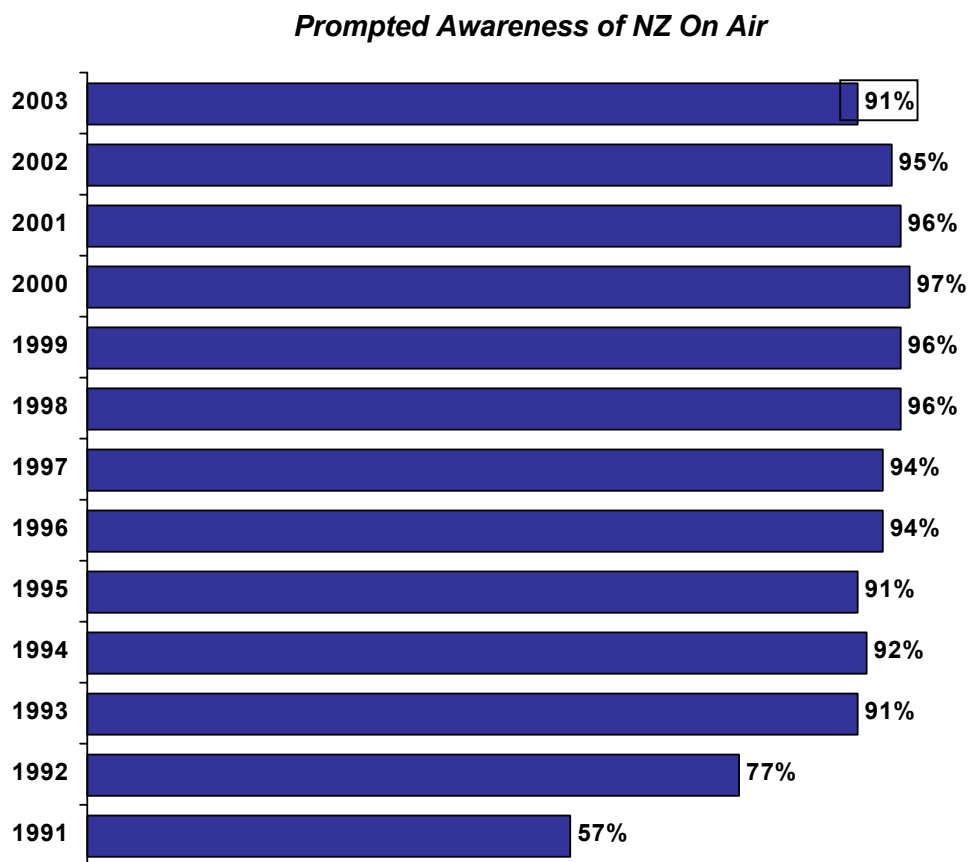
4.0

Awareness of NZ On Air

4.0 Awareness of NZ On Air

4.1 Prompted Awareness of the Organisation

People surveyed were asked whether they have heard of an organisation called NZ On Air. Ninety one percent of respondents were aware of NZ On Air in 2003. This is a significant decrease from the previous seven years results, with awareness now at a similar level to 1995.



All respondents (n=750)

- Those who were aware of NZ On Air were significantly more likely to:
 - be NZ European
 - be an older couple or single person with no children at home
 - disagree that NZ On Air helps buy overseas programmes.

Prompted Awareness of NZ On Air - Results of Pacific Peoples Compared with Non Pacific Peoples

The table below compares awareness of NZ On Air among Pacific Peoples and non Pacific Peoples in 2002 and 2003. The key points to note are:

- Significantly fewer non Pacific Peoples were aware of NZ On Air in 2003 than in 2002. There was no significant change in awareness among Pacific Peoples over time.
- Significantly less Pacific Peoples were aware of NZ On Air (87%) than non Pacific Peoples (92%) in 2003.

Awareness of NZ On Air

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Yes	87	88	92	95
No	12	11	7	4
Don't know	1	1	1	*
Base:	248	243	722	728

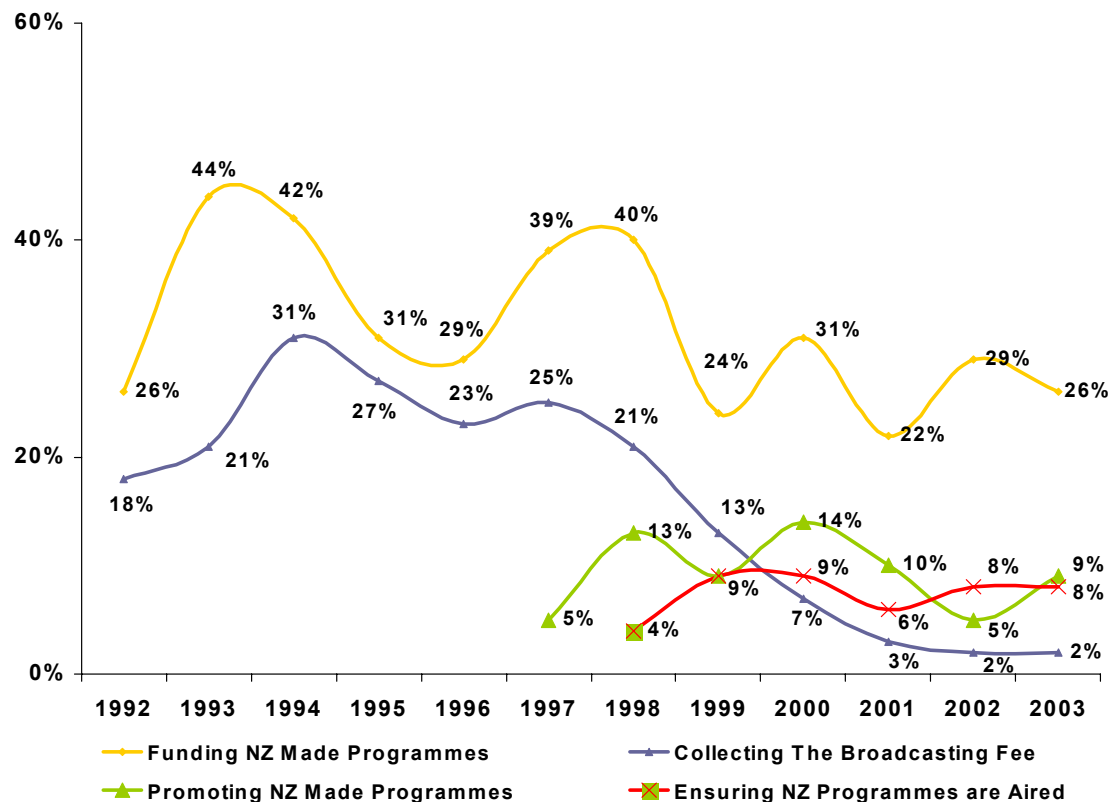
* Between zero and half a percent

4.2 Spontaneous Understanding of NZ On Air

People aware of NZ On Air were asked what they understood the functions of NZ On Air to be.

The chart below plots the four main responses over the past twelve years. After a drop in the number of people saying NZ On Air promotes New Zealand made programmes in 2002, significantly more people said this in 2003 (9%) – a similar result to 2001 (10%).

Spontaneous Understanding of NZ On Air's Functions



Base: Aware of NZ On Air (n=684)

Spontaneous Understanding of NZ On Air's Functions

A full list of NZ On Air functions mentioned by respondents is shown below. The main function of NZ On Air is still considered to be the funding of New Zealand made programmes (26%). However, significantly more people now understand NZ On Air's functions to include funding broadcasting (12% - up six percentage points) and promoting New Zealand made programmes (9% - up four percentage points) compared with 2002.

Significantly fewer people thought NZ On Air funded programmes for TV and radio (4% - down three percentage points) or made TV and radio programmes (1% - down five percentage points).

	2003 %	2002 %	2001 %	2000 %	1999 %
Funding New Zealand made programmes	26	29	22	31	24
Funding broadcasting	12	6	4	3	4
Promoting New Zealand made programmes	9	5	10	14	9
Ensuring New Zealand programmes are aired	8	8	6	9	9
Policing, censorship and maintaining standards	7	7	6	3	5
Funding programmes for TV and radio	4	7	8	1	6
Funding TV programmes	4	3	1	1	2
Making TV programmes	4	2	1	3	3
Delivering top quality programmes	3	2	3	3	3
Collecting the Broadcasting Fee	2	2	3	7	13
To inform/educate people	2	2	2	2	3
Running TV	2	2	2	1	2
Radio/TV news service	2	1	2	1	3
Making TV and radio programmes	1	6	2	3	3
Provide entertainment	1	2	1	2	1
Support New Zealand culture	1	2	*	1	1
Funding National Radio	1	1	1	*	1
Maori programmes	1	1	1	*	1
Making radio programmes	1	1	*	1	1
Advertising	*	1	1	1	1
Funding radio programmes	*	1	*	1	1
Distributing licence fee	*	*	2	1	2

Continued on following page

Table Continued

	2003 %	2002 %	2001 %	2000 %	1999 %
Service to New Zealand customers	1	*	1	3	2
Funding orchestra, opera and the arts	1	-	*	*	1
Other	4	2	4	7	1
Don't know	16	17	16	12	12
Base: Aware of NZ On Air	684	714	717	725	718

- * Between zero and half a percent
- Zero

Spontaneous Understanding of NZ On Air - Results of Pacific Peoples Compared with Non Pacific Peoples

Non Pacific Peoples were significantly more likely to think the functions of NZ On Air were to fund New Zealand made programmes, policing, censorship and maintaining standards and delivering top quality programmes compared with Pacific Peoples.

Significant change between 2002 and 2003 for both groups is highlighted in the table below.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Funding New Zealand made programmes	17	28	26	29
Funding broadcasting	16	6	12	6
Promoting New Zealand made programmes	8	9	9	5
Ensuring New Zealand programmes are aired	6	6	8	8
Running TV	4	3	3	2
Policing, censorship and maintaining standards	3	4	7	7
Funding programmes for TV and radio	3	-	4	7
Funding TV programmes	3	-	4	3
Making TV programmes	2	4	4	2
Service to New Zealand customers	2	*	1	*
Collecting the Broadcasting Fee	1	1	2	2
To inform/educate people	1	1	2	2
Advertising	1	1	*	1
Radio/TV news service	1	*	2	1
Funding National Radio	*	-	1	1
Making radio programmes	*	*	1	1
Provide entertainment	*	-	1	2
Delivering top quality programmes	*	-	3	2
Maori programmes	*	-	1	1
Funding radio programmes	-	-	*	1
Funding orchestra, opera and the arts	-	-	1	-
Making TV and radio programmes	-	5	1	6
Support New Zealand culture	-	1	1	2
Distributing licence fee	-	1	*	*
Other	4	3	4	2
Don't know	33	29	16	17
Base: Aware of NZ On Air	215	243	664	728

* Between zero and half a percent

- Zero

4.3 Is NZ On Air Part of TVNZ?

People were asked if NZ On Air is part of Television New Zealand. Significantly more people thought NZ On Air was part of Television New Zealand in 2003 (46%) compared with 2002 (40%) and is now at its highest point ever.

Is NZ On Air Part of TVNZ?

	2003 %	2002 %	2001 %	2000 %	1999 %
Yes	46	40	42	39	41
No	39	43	43	45	46
Don't know	15	17	15	16	13
Base:	750	751	750	750	750

- Those most likely to say NZ On Air **is** part of TVNZ (46%) were:
 - from Christchurch
 - female
 - Maori or 'other' ethnicity's
 - those who agreed that NZ On Air help buys overseas programmes
- Those most likely to say NZ On Air is **not** part of TVNZ (39%) were:
 - male
 - NZ European
 - aware of NZ On Air
 - those who disagreed that NZ On Air help buys overseas programmes

Is NZ On Air Part of TVNZ - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely to say that NZ On Air is part of TVNZ (67%) than non Pacific Peoples (46%).

There were no significant changes in Pacific Peoples thinking over time while significantly more non Pacific Peoples thought that NZ On Air was part of TVNZ compared with 2002 (up six percentage points).

Is NZ On Air Part of TVNZ?

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Yes	67	65	46	40
No	23	25	39	44
Don't know	10	10	15	16
Base:	248	243	722	728

4.4 Is NZ On Air Part of Radio New Zealand?

People surveyed were asked whether they thought NZ On Air is part of Radio New Zealand. Forty-four percent of people thought that NZ On Air is part of Radio New Zealand while slightly fewer people knew that NZ On Air is **not** part of Radio New Zealand.

Significantly more people thought NZ On Air was part of Radio New Zealand in 2003 compared with 2002 (up six percentage points).

Is NZ On Air Part of Radio NZ?

	2003 %	2002 %
Yes	44	38
No	41	44
Don't know	15	17
Base:	750	751

- Those most likely to say NZ On Air is part of Radio New Zealand (44%) were:
 - aged 55 years plus
 - female
 - those who thought NZ On Air helps buy overseas programmes.
- Those most likely to say NZ On Air is **not** part of Radio New Zealand (38%) were:
 - from Wellington
 - aged 18-44 years
 - male
 - NZ European
 - young families with children
 - aware of NZ On Air
 - those who thought NZ On Air does not help buy overseas programmes.

Is NZ On Air Part of Radio New Zealand? - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely to say NZ On Air is part of Radio New Zealand (52%) than non Pacific Peoples (44%).

Non Pacific Peoples were significantly more likely to think that NZ On Air is part of Radio New Zealand compared with a year ago (up 6 percentage points). Pacific Peoples results did not change over time.

Is NZ On Air Part of Radio NZ?

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Yes	52	51	44	38
No	33	32	41	45
Don't know	15	17	15	17
Base:	248	243	722	728

4.5 Prompted Awareness of NZ On Air Functions

People were read a list of NZ On Air functions and asked whether they were aware that NZ On Air has these functions. The table below shows the percentages of people **aware** of each of NZ On Air's functions. The main functions of NZ On Air are to fund New Zealand made television programmes (89%) and to promote New Zealand culture and identity (80%). Only two fifths of people (39%) were aware that NZ On Air helps fund Access radio stations.

There were no significant changes in awareness from 2002 to 2003.

	2003 %	2002 %	2001 %	2000 %	1999 %	1998 %	1997 %	1996 %
To fund New Zealand made TV programmes	89	90	91	93	90	93	96	94
To promote New Zealand culture and identity	80	81	82	79	83	74	71	68
To promote Maori language and culture on television and radio	78	77	80	76	81	74	71	69
To provide a wider range of New Zealand TV, such as drama and documentary and radio programmes than would otherwise be the case	78	77	83	87	79	82	72	71
To promote New Zealand music, for example, by funding New Zealand music videos	69	68	62	60	59	52	55	53
To ensure programmes are made for special interest groups like ethnic minorities and people with disabilities	67	65	69	63	68	63	57	53
To archive broadcasting material and historic programmes	62	59	52	54	63	56	45	45
To fund National Radio and Concert FM	53	53	59	62	67	68	73	76
To provide Teletext subtitling on some TV programmes for people who have difficulty hearing	48	44	40	41	44	47	31	30
To help fund radio stations for the Pacific Island Community in New Zealand	44	40	40	-	-	-	-	-
To help provide TV and radio reception to remote communities	41	39	36	40	45	45	47	49
To help fund Access radio stations	39	37	38	38	46	36	-	-
Base:	750	751	750	750	750	1000	825	1000

Prompted Awareness of NZ On Air Functions - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely than non Pacific Peoples to be aware that NZ On Air:

- helps provide TV and radio reception to remote communities
- promotes NZ music, for example, by funding NZ music videos
- helps fund Access radio stations
- provides teletext subtitling on some TV programmes for people who have difficulty hearing
- helps fund radio stations for the Pacific Island community in NZ.

There were no significant changes between 2002 and 2003 for either group.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
To fund New Zealand made TV programmes	86	88	89	90
To promote Maori language and culture on television and radio	83	81	78	77
To promote New Zealand culture and identity	82	80	80	81
To promote New Zealand music, for example, by funding New Zealand music videos	80	79	69	68
To provide a wider range of New Zealand TV, such as drama and documentary and radio programmes than would otherwise be the case	78	75	79	77
To ensure programmes are made for special interest groups like ethnic minorities and people with disabilities	67	65	67	65
To help fund radio stations for the Pacific Island Community in New Zealand	65	61	43	40
To archive broadcasting material and historic programmes	64	58	62	59
To help fund Access radio stations	54	55	39	36
To provide Teletext subtitling on some TV programmes for people who have difficulty hearing	59	53	48	44
To help provide TV and radio reception to remote communities	58	53	41	39
To fund National Radio and Concert FM	54	52	53	54
Base:	248	243	722	728

4.6 Attitudes Towards NZ On Air and Local Content

People were asked whether they agreed or disagreed with a set of attitudinal statements about NZ On Air and local content. The table below shows the percentages of people who agree or disagree with each of the statements.

	2003		2002		2001		2000		1999	
	Agree %	Dis-agree %	Agree %	Dis-agree %	Agree %	Dis-agree %	Agree %	Dis-agree %	Agree %	Dis-agree %
NZ On Air supports programmes and activities that are important to New Zealanders	80	7	77	6	72	8	75	8	73	10
Seeing ourselves on television and hearing our stories helps to develop our cultural identity	78	8	77	8	72	10	70	14	73	12
Without NZ On Air New Zealand drama, documentary and children's programmes would disappear	76	10	78	7	71	11	74	11	69	13
Without NZ On Air a lot of NZ arts and performance programmes would disappear*	74	9	-	-	-	-	-	-	-	-
Without NZ On Air a lot of New Zealand writing, production and acting talent would disappear	73	11	74	9	69	11	71	14	68	15
NZ On Air does provide programmes and activities that I enjoy	73	9	70	9	63	12	-	-	-	-
Without the NZ On Air National Radio and Concert FM programmes would disappear	56	14	57	11	53	16	54	17	54	19
It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet	49	21	50	20	45	25	44	26	42	25
NZ On Air only supports programmes and activities that do not interest me	15	62	18	59	16	58	20	59	19	54
Base:	750		751		750		750		750	

* New statement in 2003.

Most people agreed that 'NZ On Air supports programmes and activities that are important to New Zealanders' (80%) and 'seeing ourselves on television and hearing our stories helps to develop our cultural identity' (78%).

Only a small proportion of people agreed that 'NZ On Air only supports programmes and activities that do not interest me' (15%).

There were no significant changes in agreement compared with the 2002 results, however, significant increases are evident for all statements (with the exception of 'without NZ On Air National Radio and Concert FM programmes would disappear') since 1999. This result suggests that over time, people are becoming more aware of the positive impact NZ On Air has in New Zealand.

Attitudes Towards NZ On Air and Local Content - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely than non Pacific Peoples to agree that:

- NZ On Air only supports programmes and activities that do not interest me
- It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet

Non Pacific Peoples were significantly more likely than Pacific Peoples to agree that:

- Without NZ On Air a lot of New Zealand arts and performance programmes would disappear

There were no other significant differences between the two samples or over time.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
NZ On Air supports programmes and activities that are important to New Zealanders	83	79	79	77
Seeing ourselves on television and hearing our stories helps to develop our cultural identity	82	84	77	77
Without NZ On Air New Zealand drama, documentary and children's programmes would disappear	72	74	76	78
Without NZ On Air a lot of New Zealand writing, production and acting talent would disappear	70	74	73	74
NZ On Air does provide programmes and activities that I enjoy	70	73	72	71
Without NZ On Air a lot of NZ arts and performance programmes would disappear*	67	-	74	-
Without the NZ On Air National Radio and Concert FM programmes would disappear	59	58	56	59
It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet	58	56	48	50
NZ On Air only supports programmes and activities that do not interest me	26	23	15	17
Base:	248	243	722	728

* New statement in 2003.

4.7 New Zealand Made Arts and Performance Programmes

For the first time in 2003, people were asked a series of questions about New Zealand made arts and performance programmes.

People were firstly asked what New Zealand arts and performance programmes they were aware of. The most commonly mentioned programmes include Mercury Lane (4%), World of Wearable Art Awards (3%), the Big Art Trip (3%) and Tagata Pasifika (3%) although these were mentioned by relatively small proportions of respondents. Six in ten people surveyed (60%) were unaware of any arts and programmes made in New Zealand while a third (33%) mentioned 'other' programmes including Shortland Street, Country Calendar, the News or general items such as the ballet, music, or documentaries.

Awareness of NZ Made Arts and Performance Programmes - Mentioned by one percent or more of respondents -

	2003 %
Mercury Lane	4
World of Wearable Art Awards	3
The Big Art Trip	3
Tagata Pasifika	3
Space	2
Mobil Song Quest	2
Showstoppers	1
Wannabe Duos	1
Smokefreerockquest	1
South Pacific Cultural Festival	1
Other	33
Don't know	60
Base:	750

Awareness of NZ Made Arts and Performance Programmes - Results of Pacific Peoples Compared with Non Pacific Peoples

Not surprisingly, Pacific Peoples were significantly more likely to be aware of 'Tagata Pasifika' (14%) compared with non Pacific Peoples (2%). Pacific Peoples were also more likely to spontaneously mention 'Showstoppers' (6%).

Non Pacific Peoples were significantly more likely to not know of any New Zealand made arts and performance programmes.

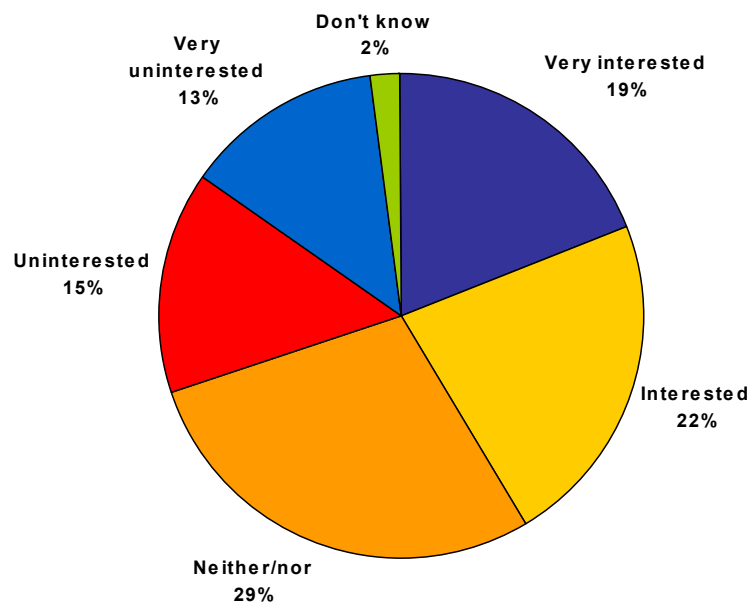
Awareness of NZ Made Arts and Performance Programmes

- Mentioned by one percent or more of respondents -

	Pacific People %	Non Pacific Peoples %
Tagata Pasifika	14	2
Showstoppers	6	1
World of Wearable Art Awards	4	3
Space	3	2
Mobil Song Quest	2	2
Wannabe Duos	2	1
South Pacific Cultural Festival	2	1
Mercury Lane	1	4
The Big Art Trip	1	3
Smokefree Festival (unspec)	1	*
Symphony Orchestra	1	*
Christmas in the Park	1	*
Smokefreerockquest	-	1
Other	36	32
Don't know	47	60
Base:	248	722

When asked how interested they were in watching New Zealand arts and performance programmes, similar numbers of people were either 'very interested' (19%) or 'interested' (22%). Over a quarter of people were either 'very uninterested' (13%) or 'uninterested' (15%) in arts and performance programmes.

Interest in NZ Made Arts and Performance Programmes



Base: 750

- Those who were interested in arts and performance programmes were significantly more likely to live in urban areas.
- Males were significantly more likely to be disinterested in arts and performance programmes.

Interest in NZ Made Arts and Performance Programmes- Results of Pacific Peoples Compared with Non Pacific Peoples

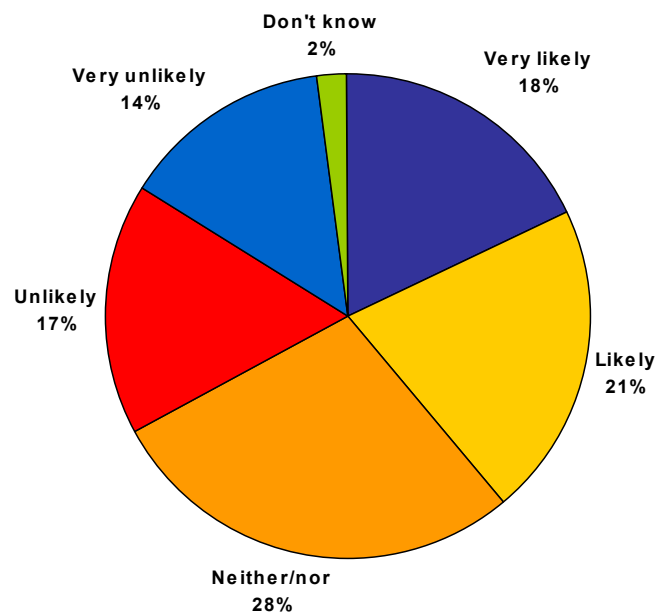
Pacific Peoples were significantly more likely to be interested in arts and performance programmes (55%) compared with non Pacific Peoples (40%). Non Pacific Peoples were more likely to be uninterested.

Interest in NZ Made Arts and Performance Programmes

	Pacific People %	Non Pacific Peoples %
Very interested	37	18
Interested	18	22
Total Interested	55	40
Neither interested nor disinterested	23	29
Uninterested	8	16
Very uninterested	11	13
Don't know	2	2
Base:	248	722

People were then asked how likely they would be to watch New Zealand arts and performance programmes on television. A similar number to that who were interested in arts and performance programmes (41%) said they were either 'very' or 'quite likely' (39%) to watch arts and performance programmes on television.

Likelihood to Watch NZ Made Arts and Performance Programmes



Base: 750

- Those who said they were likely to watch arts and performance programmes on television were significantly more likely to be:
 - female
 - Maori.
- Males were again significantly more likely to not watch arts and performance programmes.

Likelihood to Watch NZ Made Arts and Performance Programmes - Results of Pacific Peoples Compared with Non Pacific Peoples

Again, Pacific Peoples were significantly more likely to watch arts and performance programmes (54%) compared with non Pacific Peoples (39%).

Likelihood to Watch NZ Made Arts and Performance Programmes

	Pacific People %	Non Pacific Peoples %
Very likely	35	17
Likely	19	22
Total Likely	54	39
Neither likely nor unlikely	25	28
Unlikely	8	17
Very unlikely	13	14
Don't know	1	2
Base:	248	722

Interest in NZ Made Arts and Performance Programmes

People were read the list of arts and performance programmes shown in the table below and asked how interested they were in each one. More people were interested in the coverage of concerts or events (58%) than any other arts and performance programme. Fewer people were interested in reality or entertainment based programmes with a competitive element (39%). This genre also had the highest proportion of disinterested people (36%).

Interest in NZ Made Arts and Performance Programmes

	Total interested %	Neither/ nor %	Total un- interested %	Don't know %
Coverage of concerts or events	58	24	15	2
Magazine style programmes where a range of topics are covered	47	29	22	2
In-depth programmes featuring one artist or type of art	44	32	22	2
Music video based programmes	44	24	30	2
Cultural performance or events	44	29	26	1
Talent quests	43	23	33	1
Variety performance programmes like live studio shows	42	32	24	2
Reality or entertainment based programmes with a competitive element	39	24	36	2
Base: 750				

- Males tended to be more uninterested in arts and performance programmes in general.

Interest in NZ Made Arts and Performance Programmes - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely to be interested in:

- cultural performance or events
- talent quests
- music video based programmes
- reality or entertainment based programmes with a competitive element
- variety performance programmes like live studio shows

compared with non Pacific Peoples.

Interest in NZ Made Arts and Performance Programmes - Total Interested -

	Pacific Peoples %	Non Pacific Peoples %
Cultural performance or events	86	43
Talent quests	72	42
Music video based programmes	72	43
Coverage of concerts or events	61	58
Reality or entertainment based programmes with a competitive element	56	38
Variety performance programmes like live studio shows	54	41
In-depth programmes featuring one artist or type of art	49	43
Magazine style programmes where a range of topics are covered	48	47
Base:	248	722

People were then read a list of statements about arts and performance programmes as shown in the table below and asked whether they agreed or disagreed with each one. Two thirds of people agreed that arts and performance programmes are 'a good source of information' (65%) and are 'well made and of a high quality' (62%).

Only a fifth of people agreed that arts and performance programmes are 'too serious' (19%) or 'boring' (20%).

Agreement with Statements About NZ Made Arts and Performance Programmes

	Total agree %	Neither/ nor %	Total disagree %	Don't know %
A good source of information	65	21	11	3
Well made and of high quality	62	24	9	5
Enjoyable to watch	56	28	13	3
A good source of entertainment	49	32	16	3
Important to me	40	32	26	2
Screened at a time that is convenient to me	36	29	27	7
Boring	20	33	44	4
Too serious	19	33	42	6
Base: 750				

Agreement with Statements About NZ Made Arts and Performance Programmes - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely to agree that arts and performance programmes are:

- a good source of entertainment
- enjoyable to watch
- important to them
- screened at a time that is convenient.

compared to non Pacific Peoples.

Agreement with Statements About NZ Made Arts and Performance Programmes - Total Agreement -

	Pacific Peoples %	Non Pacific Peoples %
A good source of information	70	64
A good source of entertainment	67	48
Enjoyable to watch	65	55
Well made and of high quality	59	62
Important to me	54	39
Screened at a time that is convenient to me	46	36
Too serious	37	18
Boring	27	20
Base:	248	722

- Males were more likely to disagree with most of these statements.

5.0

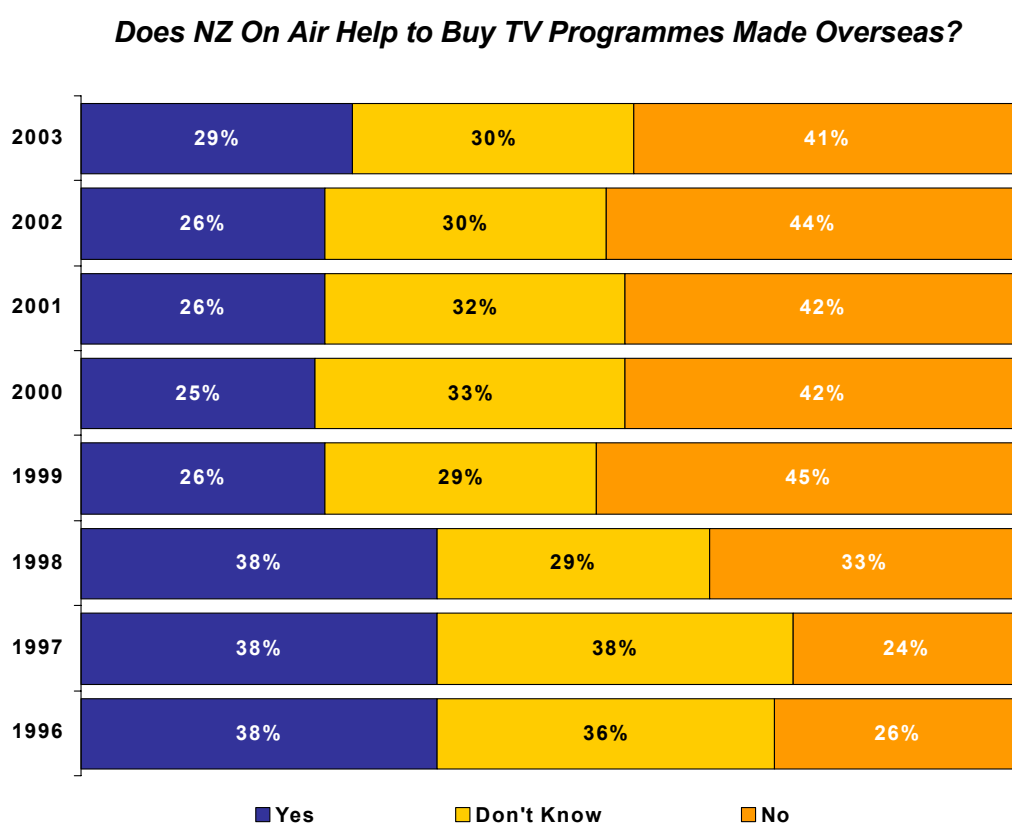
Use of NZ On Air Funding

5.0 Use of NZ On Air Funding

5.1 Buying Programmes Made Overseas

People were asked if they thought NZ On Air helps to buy television programmes made overseas. Three in ten New Zealanders (29%) think NZ On Air buys television programmes made overseas. Four in ten (41%) think that NZ On Air does not buy television programmes made overseas and a further three in ten were unsure (29%).

These results have remained stable since 1999.



Base: All Respondents

- Those most likely to say that NZ On Air **does** help to buy television programmes made overseas were:
 - from Wellington
 - aged 45-54 years
 - not aware of NZ On Air.

- Those most likely to say that NZ On Air does **not** help to buy television programmes made overseas were:
 - aged 18-34 years
 - male
 - young single/couple or a family with young children
 - from an urban area
 - aware of NZ On Air.

Buying Programmes Made Overseas - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely to think that NZ On Air buys programmes made overseas (45%) compared with non Pacific Peoples (29%).

There were no significant changes over time for both Pacific and non Pacific Peoples.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Yes	45	39	29	26
No	32	33	41	45
Don't know	23	28	30	30
Base:	248	243	722	728

5.2 Programmes Funded by NZ On Air

People were asked to spontaneously recall the names of NZ On Air funded programmes. Those programmes which are currently **not** funded directly by NZ On Air are shown in bold.

- mentioned by one percent or more of respondents -

	2003 %	2002 %	2001 %		2003 %	2002 %	2001 %
Shortland Street²	21	32	23	Gone Fishing	1	*	-
What Now?	12	16	9	Asia Down Under	1	2	-
News (unspecified)	8	11	14	Target	1	1	2
Sticky TV	8	6	-	Squeeze	1	1	*
National Radio	7	3	4	Pukana¹	1	1	1
Street Legal	7	1	1	Squirt	1	1	*
Inside New Zealand	6	6	6	Marae¹	1	1	2
Mercy Peak	5	13	-	Game of Two Halves	1	1	-
Country Calendar	5	7	7	Waka Huia¹	1	1	1
Mai Time	5	6	10	Concert Programme	1	1	2
Space	5	4	2	The Breakfast Show	1	1	2
Documentary NZ	4	9	14	Morning Report	1	*	-
Te Karere¹	4	5	6	Good Morning	1	1	3
20/20	4	4	4	The Big Art Trip	1	1	-
Suzy Cato	3	5	7	Colonial House	1	-	-
Tagata Pasifika	3	5	5	Access Radio	1	-	-
Pulp Comedy	3	5	1	Sport (unspec)	1	-	-
60 Minutes	3	4	5	How's Life	1	-	-
Fair Go	3	3	4	Mataku	1	-	-
Holmes	3	2	4	Inside Out	1	-	-
Praise Be	2	5	3	Home Front	1		
Bumble	2	4	5	Finding J Smith	1	-	-
Spin Doctors	2	3	-	Havoc & Newsboys	*	1	8
Maggie's Garden Show	2	*	-	Sell-out Tour	*	2	-
Mercury Lane	2	-	-	Captains Log			
Queer Nation	2	*	-	The Chair	-	1	-
Being Eve	2	-	-	Te Tutu	-	1	*
Sunday	2	3	-	Number 8 Wired	-	3	-
The Strip	1	15	-	You and Me	-	1	2
Assignment	1	5	2				

* Between zero and half a percent

- Zero

A full list of programmes mentioned by less than one percent of those interviewed appears in the appendix.

- Significant **decreases** since 2002 include:

¹ Funded by Te Mangai Paho which until 1 July 2000 was funded directly by NZ On Air.

² Previously funded by NZ On Air.

- The Strip (down 14 percentage points)
 - Shortland Street (down 11 percentage points)
 - Mercy Peak (down 8 percentage points)
 - Documentary NZ (down 5 percentage points)
 - What Now (down 4 percentage points)
 - News (down 3 percentage points)
 - Suzy Cato (down 2 percentage points)
 - Tagata Pasifika (down 2 percentage points)
 - Pulp Comedy (down 2 percentage points)
- Significant **increases** since 2002 include:
 - Street Legal (up 6 percentage points)
 - National radio (up 4 percentage points).

Please note, changes over time may be due to what programmes were on air at the time of interviewing and may not accurately reflect changes in awareness.

5.3 Knowledge of Programmes Funded by NZ On Air

People were asked an open-ended question about how they could tell a programme was funded by NZ On Air.

As in previous years, most people can tell if a programme is funded by NZ On Air by the logo at the end of the programme (63%). All other methods remained relatively similar over time.

Significantly fewer people did not know how to tell if a programme was funded by NZ On Air in 2003 (12%) compared with 1999 (17%) suggesting that awareness of how NZ On Air promotes itself is improving.

	2003 %	2002 %	2001 %	2000 %	1999 %
NZ On Air logo at the end of programmes	63	66	60	54	57
NZ On Air logo at the beginning of programmes	8	8	13	8	6
From information in the Listener/TV Guide advertisements	5	4	-	-	-
New Zealand made	4	5	6	7	9
By the content	4	3	4	7	1
Told at the beginning and the end of programmes	3	4	1	2	5
Stars/New Zealand actors	2	2	5	7	3
Quality of the programme	1	1	4	2	2
By what I read	1	*	3	3	3
Word of mouth	1	*	2	-	-
Is a national program	1	-	-	-	-
There is no advertising	1	-	-	-	-
They're not commercial programmes/have to be funded by someone	1	-	-	-	-
Other	1	*	1	4	8
Don't know	12	13	15	16	17
Base: Aware of Programmes Funded by NZ On Air	370	455	457	485	487

* Between zero and half a percent

- Zero

- Those more likely know a programme was funded by NZ On Air by the logo at the end of a programmes were:
 - aged 18-34 years
 - Maori.

Knowledge of Programmes Funded by NZ On Air – Results of Pacific Peoples Compared with Non Pacific Peoples

Compared with non Pacific Peoples, Pacific Peoples were significantly more likely to know a programme was funded by NZ On Air by the logo at the end of the programme (78% compared with 62%). This was also a significant increase from 2002.

Fewer Pacific Peoples said they knew a programme was funded by NZ On Air by the logo at the beginning of the programme compared with 2002 (down 8 percentage points) while more said the New Zealand actors indicated it was funded by NZ On Air (up 4 percentage points).

	Pacific Peoples %		Non-Pacific Peoples %	
	2003	2002	2003	2002
NZ On Air logo at the end of programmes	78	65	62	66
NZ On Air logo at the beginning of programmes	11	19	8	8
Stars/New Zealand actors	5	1	2	2
From information in the Listener/TV Guide advertisements	3	2	5	4
By the content	2	4	4	3
Told at the beginning and the end of programmes	2	4	3	4
New Zealand made	1	2	4	5
Quality of the programme	1	2	1	1
By what I read	1	-	1	*
Word of mouth	1	-	1	*
Is a national program	1	-	1	-
There is no advertising	-	-	1	-
They're not commercial programmes/have to be funded by someone	-	-	1	*
Other	-	*	1	-
Don't know	5	12	12	14
Base: Aware of Programmes Funded by NZ On Air	149	243	356	728

* Between zero and half a percent

- Zero

5.4 Opinion on the Services NZ On Air Should Fund

People were asked how important they thought it was for NZ On Air to fund particular services.

Key services that people thought were important ('very important' or 'important') for NZ On Air to fund included: teletext subtitles on television programmes (83%), television and radio reception for remote communities (83%), in-depth documentaries on television (82%), New Zealand children's programmes (79%) and programmes for people with disabilities (78%).

The following services were considered to be of lower importance for NZ On Air funding: Pacific Island Radio Stations in New Zealand (44%), NZ programmes for minorities (45%), Maori radio and television partly in Te Reo (46%) and NZ arts and performance programmes (46%).

	Very Important %	Important %	Total Important %	Neutral %	Quite Un-important %	Very Un-important %	Don't Know %
Teletext subtitles on television programmes	55	27	83	11	3	3	1
Television and radio reception for remote communities	51	31	83	10	3	2	1
In-depth NZ documentaries on TV	51	31	82	11	3	2	1
NZ children's programmes on TV	44	35	79	13	3	3	2
NZ programmes for people with disabilities	41	36	78	14	2	2	4
NZ music	41	36	77	15	4	3	1
Children's programmes reflecting Maori language and culture for all children	33	30	63	20	8	7	2
NZ children's drama programmes	29	35	63	21	5	4	7
National Radio and Concert FM	34	27	60	24	7	6	3
Maori radio and television in English	28	31	59	23	8	8	2
NZ drama on TV	28	31	59	23	9	6	2
NZ comedy programmes	25	34	59	24	9	7	2
Documentaries about Maori people and Maori issues for a general audience	27	30	57	26	8	7	2
NZ programmes for ethnic minorities	27	29	55	27	9	7	2
Drama and comedy made by and about Maori for a general audience	23	30	53	28	9	7	3
Access radio stations	22	26	48	28	9	5	11
Reality and entertainment focussed NZ documentaries	20	28	48	25	13	11	2
NZ arts and performance programmes	21	25	46	32	9	7	6
Maori radio and television partly in Te Reo	20	26	46	28	13	11	2
NZ programmes for minorities	19	26	45	29	14	7	4
Pacific Island radio stations in NZ	20	24	44	29	14	10	3

Base: 750

Opinion of the Services NZ On Air Should Fund - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely than non Pacific Peoples to rate the following services as important:

- programmes for ethnic minorities
- New Zealand music
- Pacific Island radio stations in NZ
- Children's programmes reflecting Maori language and culture for all children
- Maori radio and television in English
- Access radio stations
- Maori radio and television partly in Te Reo.

Non Pacific People were more likely than Pacific Peoples to rate in-depth documentaries and television/radio reception for remote communities as more important.

	Pacific Peoples		Non-Pacific Peoples	
	Important %	Unimportant %	Important %	Unimportant %
Programmes for ethnic minorities	86	4	55	16
New Zealand music	83	5	77	7
Pacific Island Radio Stations in New Zealand	83	5	43	25
Programmes for people with disabilities	81	6	77	4
New Zealand children's programmes on TV	81	7	79	6
Teletext subtitles on television programmes	79	10	83	5
Children's programmes reflecting Maori language and culture for all children	72	13	63	15
In-depth documentaries on TV	70	13	83	5
Television/radio reception for remote communities	68	8	83	6
Maori radio and television in English	66	14	58	17
New Zealand children's drama programmes	65	12	64	9
Access radio stations	63	14	48	13
Documentaries about Maori people and Maori issues for a general audience	58	16	56	15
New Zealand drama on TV	56	22	60	15
Maori radio and television partly in Te Reo	55	20	46	24
National Radio and Concert FM	54	18	60	13
Drama and comedy made by and about Maori for a general audience	54	21	53	16
New Zealand comedy programmes	54	21	59	15
Programmes for minorities	52	18	45	21
Reality or entertainment focussed NZ documentaries	51	22	48	25
Arts and performance programmes	48	21	45	16
Base:	248		722	

Comparison of Importance for Funding Between 1999, 2000, 2001, 2002 and 2003

The table below shows the total importance given to each of the funding statements in 1999, 2000, 2001, 2002 and 2003.

Compared with 2002 there has been an increase in people saying NZ On Air should fund in-depth documentaries on television. There has also been a significant increase since 1999 in those who think NZ On Air should fund New Zealand music and comedy.

However, significant **decreases** were evident compared with 2002 in the number of people saying NZ On Air should fund National Radio and Concert FM, documentaries about Maori and Maori issues, arts and performance programmes, Maori radio and television in Te Reo and NZ programmes for minorities. Support for funding NZ drama continues to fall, down from 72 percent in 1999 to 59 percent in 2003.

	Total Important				
	2003 %	2002 %	2001 %	2000 %	1999 %
Television and radio reception for remote communities	83	84	83	83	81
Teletext subtitles on television programmes*	83	-	-	-	-
In-depth documentaries on TV	82	75	75	81	78
New Zealand children's programmes on TV	79	79	83	86	83
NZ programmes for people with disabilities	78	82	79	75	79
New Zealand music	77	79	73	72	72
Children's programmes reflecting Maori language and culture	63	63	61	63	-
New Zealand children's drama programmes	63	60	61	66	66
National Radio and Concert FM	60	65	65	61	64
Maori radio and television in English	59	62	59	59	57
New Zealand comedy	59	56	46	56	53
New Zealand drama on TV	59	54	55	74	72
Documentaries about Maori people and Maori issues for a general audience	57	63	58	54	-
NZ programmes for ethnic minorities	55	58	55	51	50
Drama and comedy made by and about Maori for a general audience	53	56	54	50	-
Reality/entertainment focussed NZ documentaries	48	50	59	40	52
Access radio stations	48	46	44	44	47
NZ arts and performance programmes	46	60	47	51	57
Maori radio and television in Te Reo	46	54	49	50	53
NZ programmes for minorities	45	52	42	44	43
Pacific Island radio stations in New Zealand	44	49	47	-	-
Base:	750	751	750	750	750

NB: In 2000 four new statements were added, in 2001 two additional statements were added.

* New statement in 2003

5.5 Use of Further Funding

People were asked to indicate spontaneously the types of programmes they would like to see funded if NZ On Air had additional funding available. Results are shown in the table below.

Documentaries are still the most preferred type of programme people would like to see funded (17%). Significantly more people spontaneously mentioned funding of music and New Zealand programmes in general compared with 2002. Significantly fewer people would like to see comedy, documentaries, children's and NZ history/geography programmes funded in 2003. Interestingly, significantly fewer people said they either didn't know or there were no programmes they would like to see funded by NZ On Air.

	2003 %	2002 %	2001 %	2000 %	1999 %
Documentaries	17	19	20	18	23
Music	9	5	6	7	5
Drama	8	7	9	9	10
Comedy	5	9	7	7	7
Documentaries about NZ (including culture)	5	8	7	-	-
Educational	5	6	6	6	7
Sports	5	2	4	6	7
Maori language and culture	4	3	5	3	1
Arts and performance	4	3	4	4	5
Children's	3	5	5	8	4
New Zealand history/geography	3	5	5	2	3
Current affairs	3	2	1	4	5
New Zealand programmes	3	1	3	3	3
Real life	2	1	3		-
Minority sports	1	2	1	3	1
Ethnic minority groups	1	1	3	2	1
English (UK) programmes	1	1	2	1	2
Movies	1	1	1		-
Local news	1	1	*	1	1
Environmental/conservation	1	1	*	1	1
Travel	1	*	1	1	1
Christian programmes	1	*	1	-	-
Less advertising/commercial free station	1	*	1	-	-
Overseas movies	1	*	*	1	1
Self help/house decorating/consumer	*	-	1	-	-
Historical drama	-	-	-	*	1
Other ¹	11	12	10	11	9
Nothing/Don't know	22	28	25	33	36
Base:	750	751	750	750	750

* Between zero and half a percent

- Zero

¹ Other includes: all existing programmes, fewer repeats of programmes, fewer reality-based programmes, family viewing programmes (no swearing, no violence, no sex), fewer American programmes, better quality daytime TV, programmes after midnight, language training for presenters.

Use of Further Funding - Results of Pacific Peoples Compared with Non Pacific Peoples

Non Pacific People were significantly more likely to want to see documentaries on television compared with Pacific People. This is due to the significant drop in results for Pacific People compared with 2002 (from 16% to 5%). Non Pacific People were also more likely to want to see music and drama funded by NZ On Air, while Pacific People were more likely to mention 'other' programmes or to not know what NZ On Air should fund.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Documentaries	5	16	18	20
Music	5	7	18	5
Drama	4	3	8	7
Maori language and culture	4	3	4	3
Sports	4	2	5	2
Educational	3	7	5	6
Comedy	2	5	5	9
Documentaries about NZ (including culture)	2	4	5	8
Children's	2	4	3	5
Arts and performance	2	2	3	4
New Zealand programmes	2	2	2	1
Ethnic minority groups	2	1	1	1
New Zealand history/geography	1	2	3	5
Current affairs	1	2	3	2
Real life	1	1	2	1
Local news	1	1	1	1
Self help/house decorating/consumer	1	1	*	-
Movies	1	*	1	1
Overseas movies	1	*	1	*
Minority sports	*	1	1	2
Christian programmes	*	*	1	*
Environmental/conservation	-	-	1	1
English (UK) programmes	-	-	1	1
Less advertising/commercial free station	-	-	1	*
Travel	-	-	1	*
Other	22	19	11	13
Nothing/Don't know	38	32	22	29
Base:	248	243	722	728

* Between zero and half a percent

- Zero

¹ Other includes: all existing programmes, fewer repeats of programmes, fewer reality-based programmes, family viewing programmes (no swearing, no violence, no sex), fewer American programmes, better quality daytime TV, programmes after midnight, language training for presenters.

6.0

New Zealand Television

6.0 New Zealand Television

6.1 Perception of the Amount of New Zealand Made Programmes

People were asked what percentage of programmes shown on television they thought were New Zealand made. In 2003, two in ten people (21%) correctly said that between 16 and 25 percent of programmes on television are New Zealand made. Three in ten thought it was between zero and 15 percent while the same number thought 26-50 percent of programmes on television were made in New Zealand.

Since 1998, there appears to be a change in perceptions with regard to the proportion of locally made television, namely that it is increasing.

Significantly fewer people said they did not know compared with 2002, however this result was similar to previous years.

	2003 %	2002 %	2001 %	2000 %	1999 %	1998 %
0-15 percent	30	27	27	29	39	34
16-25 percent	21	24	25	25	25	30
26-50 percent	30	28	26	26	18	19
51-75 percent	3	3	5	4	2	1
76-100 percent	1	1	1	1	1	-
Don't know	14	18	16	15	15	16
Base:	750	751	750	750	750	1000

- Zero

- Those who tended to estimate a **lower** percentage of New Zealand made programmes were:
 - male
 - aged 18-34 years
 - aware of NZ On Air.
- Those who tended to estimate a **higher** percentage of New Zealand made programmes were:
 - female
 - aged 18-34 years.

Perception of the Amount of New Zealand Made Programmes - Results of Pacific Peoples Compared with Non Pacific Peoples

Interestingly, non Pacific Peoples were significantly more likely than Pacific Peoples to underestimate the percentage of New Zealand made programmes shown on television while Pacific Peoples were more likely to overestimate the percentage of programmes made in New Zealand (i.e. 51 percent or higher).

Compared with 2002, Pacific Peoples were more likely to know what percentage of programmes screened are made in New Zealand while non Pacific Peoples were more likely to **not** know.

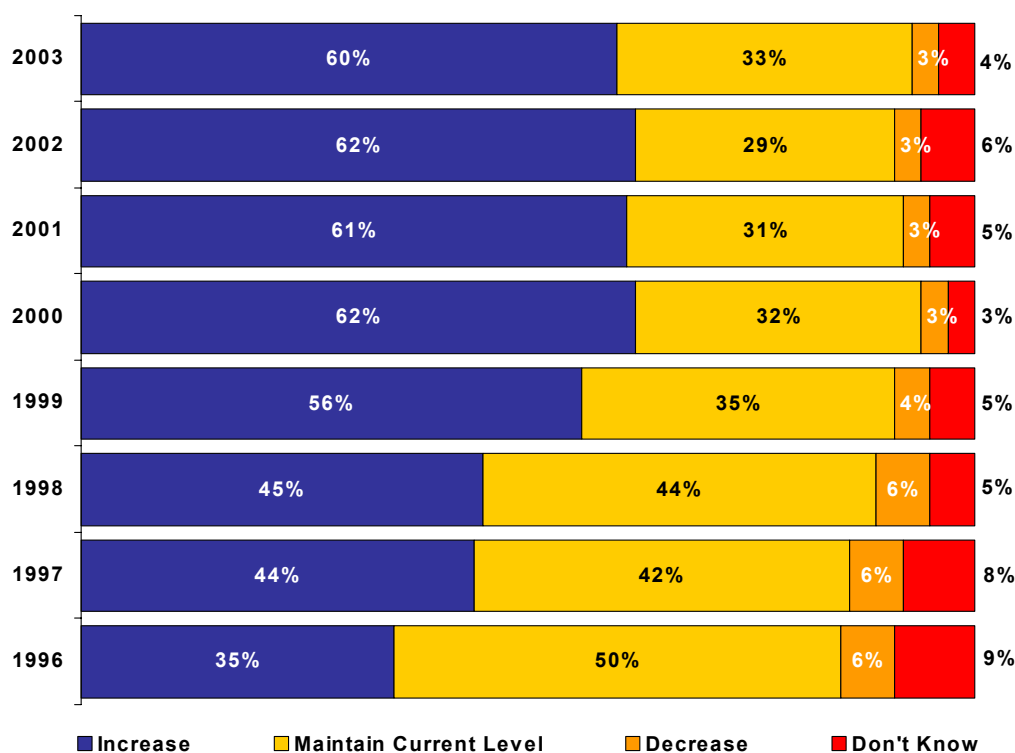
	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
0-15 percent	19	19	31	27
16-25 percent	13	16	22	24
26-50 percent	43	36	29	27
51-75 percent	10	7	3	3
76-100 percent	6	4	1	1
Don't know	9	18	15	8
Base:	248	243	722	728

6.2 Should the Amount of New Zealand Local Content on Television Increase?

People were told that currently around 24 percent of programmes shown on television are New Zealand made. They were then asked whether they felt this figure should increase, remain the same, or decrease.

Support for increasing the amount of New Zealand made television programmes has grown substantially from 35 percent in 1996 to 60 percent in 2003. Correspondingly, since 1996, consistently fewer people have said the current level of New Zealand made programmes should decrease. There has been no significant change between 2002 and 2003.

Amount Of New Zealand Made TV Programmes Should ...



Base: All respondents (n=750)

- Those **most** likely to say that the amount of New Zealand made programmes on television should increase were:
 - female
 - Maori
 - those who think that NZ On Air helps buy overseas programmes.

- Those **most** likely to say that the amount of New Zealand made programmes on television should stay the same were:
 - male
 - NZ European
 - those who think that NZ On Air does not help buy overseas programmes.
- There were no significant differences evident among those who thought the amount of New Zealand made programmes should decrease.

Should the Amount of New Zealand Local Content on Television Increase? - Results of Pacific Peoples Compared with Non Pacific Peoples

Two thirds of Pacific Peoples (66%) said they wanted an increase in the amount of New Zealand made programmes, compared to 60 percent of non Pacific Peoples. Correspondingly, Pacific Peoples were less likely than non Pacific Peoples to say they wanted the amount of New Zealand made television to stay the same (24% compared to 34% respectively).

Compared with 2002, significantly fewer Pacific Peoples wanted to see the amount of New Zealand made television programmes increase (down 7 percentage points) and more wanted the amount to decrease (up 4 percentage points). More non Pacific Peoples wanted to keep the amount of New Zealand made programmes the same compared with 2002 (up 5 percentage points).

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Increase	66	73	60	61
Stay the same	24	22	34	29
Decrease	7	3	3	3
Don't know	2	2	4	6
Base:	248	243	722	728

6.3 Opinion on New Zealand's Television Local Content, Given the Local Content Levels in Other Countries

To give people an understanding of the levels of local programming in other countries, people were told that television local content in Australia is around 55 percent, in England it is over 75 percent, and in the United States it is over 90 percent. Given this information, people were again asked whether the amount of New Zealand made programmes should increase, stay the same or decrease.

After being told the comparative figures, significantly more people said the amount of programmes made in New Zealand should increase (69% compared with the initial response of 60%). This was a similar result to previous years.

	2003		2002		2001		2000		1999	
	Initial Response %	After Being Told %	Initial Response %	After Being Told %	Initial Response %	After Being Told %	Initial Response %	After Being Told %	Initial Response %	After Being Told %
Increase	60	69	62	70	61	67	62	69	56	63
Stay the same	33	25	29	25	31	27	32	27	35	31
Decrease	3	3	3	2	3	3	3	2	4	3
Don't know	4	3	6	3	5	3	3	2	5	3
Base:	750		751		750		750		750	

Opinion of NZ's Television Local Content Given the Local Content Levels in Other Countries – Results of Pacific Peoples Compared with Non Pacific Peoples

Similarly high numbers of Pacific People (72%) and non Pacific People (68%) thought the amount of New Zealand made programmes shown on television should increase given the local content levels in other countries.

Significantly more Pacific People said the amount of New Zealand made programmes on television should decrease compared with a year ago and compared with non Pacific Peoples.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Increase	72	79	68	69
Stay the same	20	17	26	25
Decrease	7	2	3	2
Don't know	2	2	3	3
Base:	248	243	722	728

6.4 Compulsory Screening of New Zealand Made Programmes – in Total and by Genre

People were asked whether they thought free to air television channels like TV1, TV2, TV3, TV4 and Prime should be made to screen a set amount of New Zealand made television programmes from a list of programme genres. The table below shows the results.

Please note that in previous years people were asked whether free to air TV should screen a **minimum** amount, as opposed to a set amount as was asked in 2003. Possibly, as a result of the change in the question, significantly more people said that free to air channels should be made to screen a set amount of **all** genres, the most popular being documentaries (87%) and children and young persons programmes (84%).

Free to Air TV Should Be Made to Screen A Set Amount of... - Yes -

	2003 %	2002 %	2001 %	2000 %	1999 %
New Zealand made documentaries	87	74	76	76	86
New Zealand made children and young persons programmes	84	75	75	78	82
New Zealand made programmes	82	71	72	74	83
New Zealand made special interest programmes	81	71	72	72	79
New Zealand made arts and performance programmes	73	64	64	66	72
New Zealand made drama programmes^	73	66	69	70	77
New Zealand made comedy programmes^	71	66	69	70	77
Base:	750	751	750	750	750

^ Comedy and drama were combined in previous years. Results from 2002 to 1999 (shown in red) are combined results.

Compulsory Screening of New Zealand Made Programmes – Results of Pacific Peoples Compared with Non Pacific Peoples

There were no significant differences between Pacific Peoples and non Pacific Peoples as to whether free to air television channels like TV1, TV2, TV3, TV4 and Prime should be made to screen a set amount of New Zealand programmes from a given list of programme genres.

However, significant increases were evident compared with the 2002 results, again possibly due to the change in question wording.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
New Zealand made programmes	81	75	81	71
New Zealand made children and young persons programmes	87	78	84	76
New Zealand made special interest programmes	83	76	81	72
New Zealand made documentaries	86	76	87	74
New Zealand made drama programmes	75	70	73	67
New Zealand made comedy programmes	75	70	71	67
New Zealand made arts and performance programmes	79	70	73	64
Base:	248	243	722	728

Compulsory Screening of New Zealand Programmes Given the Expense

People were told that it is more expensive for TV channels to buy never seen before New Zealand programmes than to buy ready made overseas programmes. They were then asked again whether free to air channels should be made to screen a certain amount of New Zealand made programmes. The table below shows the results.

Over four fifths of respondents said free to air channels should be made to screen a certain amount of New Zealand made programmes (81%). When told of the relative expense, just over three-quarters of respondents said free to air channels should be made to screen a certain amount of New Zealand made programmes (76%).

	2003		2002		2001		2000	
	Initial Response %	Given the Expense %	Initial Response %	Given the Expense %	Initial Response %	Given the Expense %	Initial Response %	Given the Expense %
Yes	81	76	71	74	72	72	74	71
No	15	18	25	22	24	22	23	24
Don't know	3	7	4	5	4	6	3	5
Base:	750		751		750		750	

- Maori were more likely to think that free to air channels should be made to screen a certain amount of New Zealand made programmes after hearing of the expense.

Compulsory Screening of New Zealand Programmes Given the Expense – Results of Pacific Peoples Compared with Non Pacific Peoples

Having been told of the extra expense of New Zealand programmes, the same proportion of Pacific Peoples and non Pacific Peoples think free to air channels should be made to screen a certain amount of New Zealand made programmes (76% and 75% respectively).

	Pacific Peoples		Non Pacific Peoples	
	Initial response %	Given the expense %	Initial response %	Given the expense %
Yes	81	76	81	75
No	17	20	15	18
Don't know	2	4	3	7
Base:	248		722	

7.0

Television Viewing and Radio Listening Behaviour

7.0 Television Viewing and Radio Listening Behaviour

7.1 New Zealand Music on the Radio

People were asked whether over the last twelve months the amount of New Zealand music being played on the radio has increased, stayed the same, or decreased.

Over half thought the amount of New Zealand music being played on the radio has increased (57%). There were no significant changes in results compared with 2002.

	2003 %	2002 %
Increased	57	55
Stayed about the same	17	16
Decreased	5	4
Don't know	21	25
Base:	750	751

New Zealand Music on the Radio - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely to think the amount of New Zealand music being played on the radio has increased over the last twelve months (67%) compared with non Pacific Peoples (56%).

There were no significant changes in results compared with 2002 for either group.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Increased	67	66	56	55
Stayed about the same	21	20	17	16
Decreased	7	7	5	4
Don't know	5	8	21	25
Base:	248	243	722	728

7.2 Opinions About New Zealand Music on the Radio

People were asked to state on a scale of one to five how important they thought it was that radio stations are encouraged to play more New Zealand music and that more New Zealand music is played on the radio. The table below shows their responses.

Nearly two thirds of respondents thought that it was important for radio stations to be encouraged to play more New Zealand music (66%), a similar result to 2002 (65%).

The same proportion of people also thought that it was important for more New Zealand music to be played on the radio (66%), again a similar result to 2002 (63%).

There were no significant changes over time.

	Very Important %		Important %		Total Important %		Neutral %		Quite Unimportant %		Very Unimportant %		Don't Know %	
	'03	'02	'03	'02	'03	'02	'03	'02	'03	'02	'03	'02	'03	'02
Radio stations are encouraged to play more NZ music	39	42	27	23	66	65	19	20	6	5	6	5	4	5
More NZ music is played on the radio	39	39	27	24	66	63	19	20	5	4	6	6	5	7
Base: 750														

- People aged 18-34 years were significantly more likely to say it was important that radio stations are encouraged to play more New Zealand music and that more New Zealand music is played on the radio.
- Males were more likely to rate both statements as unimportant.

Opinions About New Zealand Music on the Radio - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely than non Pacific Peoples to think that it was important for radio stations to be encouraged to play more New Zealand music (73% compared with 66%) and that it is important for more New Zealand music to be played on the radio (73% compared with 66%).

There were no significant changes in results over time.

Opinions About New Zealand Music on the Radio

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
Radio stations are encouraged to play more NZ music	73	77	66	65
More NZ music is played on the radio	73	76	66	64
Base:	248	243	722	728

7.3 Radio and Television Programmes Regularly Listened to or Watched

People were read out a list of radio and television programmes and services in rotated order and asked if anyone in their household **regularly** listens to, or watches any of them. The results are in the table below. All programmes recorded in 1995 and still being recorded today are significantly more popular now, with the exception of National Radio and Concert FM whose popularity has not altered significantly.

Interestingly, all programmes and services were listened to or watched by significantly more people in 2003 than in previous years with the exception of television documentaries such as Inside New Zealand and Documentary New Zealand. However, this genre continues to clearly be the most popularly watched among New Zealand households (91%).

	2003 %	2002 %	2001 %	2000 %	1999 %	1998 %
New Zealand television documentary programmes made with the help of NZ On Air, like Inside New Zealand and Documentary New Zealand	91	89	92	87	87	-
New Zealand television drama programmes made with the help of NZ On Air, [Mercy Peak or The Strip] ¹	64	54	47	61	63	-
New Zealand comedy programmes made with the help of NZ On Air, [Spin Doctors or Pulp Comedy] ¹	63	56	46	49	-	-
New Zealand special interest programmes made with the help of NZ On Air [Praise Be and Asia Down Under] ¹	62	48	39	32	32	-
New Zealand children's programmes made with the help of NZ On Air, [What Now? or Sticky TV] ¹	56	46	49	50	43	-
NZ television arts and performance programmes made with the help of NZ On Air, [The Mercury Lane or Space] ¹	50	38	30	56	66	-
National Radio including programmes, like Morning Report, Kim Hill and Saturday Morning with John Campbell	49	36	40	36	37	35
NZ On Air funded music videos which screen on TV programmes like 'Squeeze', 'Most Wanted' and 'M2'	45	38	42	41	36	26
Maori radio stations and TV programmes in English	41	27	-	-	-	-
Concert FM, this is the station that plays classical music	38	29	30	32	32	25
Teletext subtitles, on television programmes. These are written words on the screen so people who have difficulty hearing can understand the programmes.	36	26	26	23	21	15
New Zealand Music programmes on commercial radio stations like "Keeping it Kiwi" and "The Beat Files"	33	21	21	19	25	20
Maori radio stations and TV programmes in Te Reo like Waka Huia, Marae and Te Karere	25	18	20	21	21	13
Access radio stations	25	11	14	14	18	12
Student radio stations which is music broadcast from university campuses	24	15	14	17	14	12
Pacific Island radio stations like Samoan Capital Radio in Wellington or Radio 531 PI in Auckland	16	8	10	8	-	-
Base:	750	751	750	750	750	1000

¹ Programme names only used as prompts where necessary

Using factor analysis¹, four segments of those who watch particular types of segments are shown to watch similar types of programmes. The table below shows the four distinct groups and the types of programmes that they and their household tend to watch/listen.

SPECIAL INTEREST GROUPS <ul style="list-style-type: none"> ❖ Teletext subtitles on television programmes ❖ Maori radio stations and TV programmes in Te Reo ❖ Maori radio stations and TV programmes in English ❖ Pacific Island radio stations ❖ NZ children's programmes on TV 	RADIO HEADS <ul style="list-style-type: none"> ❖ National Radio ❖ Concert FM ❖ Access radio stations
TV WATCHERS <ul style="list-style-type: none"> ❖ NZ comedy programmes ❖ NZ documentary programmes ❖ NZ special interest programmes ❖ NZ arts and performance programmes ❖ NZ drama programmes 	MUSOS <ul style="list-style-type: none"> ❖ NZ music programmes on commercial radio stations ❖ NZ On Air funded music videos ❖ Student radio stations playing NZ music

¹ Factor analysis groups variables by looking at the data and finding groups which are associated by the fact that respondents have either seen all or most of them or very few if any of them, or if they rate them very similarly.

Radio and Television Programmes Regularly Listened To or Watched - Results of Pacific Peoples Compared with Non Pacific Peoples

Significantly more Pacific Peoples said people in their household listen to or watch children's programmes, teletext subtitles, Access radio stations, Maori radio stations and TV programmes both in Te Reo and Maori, Pacific Island radio stations, music and student radio stations compared with non Pacific Peoples.

Significantly more non Pacific Peoples said people in their household listen to or watch NZ On Air funded programmes/radio stations than in 2002.

	Pacific Peoples		Non Pacific Peoples	
	2003 %	2002 %	2003 %	2002 %
New Zealand children's programmes made with the help of NZ On Air, [What Now? or Sticky TV] ¹	87	72	55	45
New Zealand television documentary programmes made with the help of NZ On Air, like Inside New Zealand and Documentary New Zealand	86	91	91	89
Pacific Island radio stations like Samoan Capital Radio in Wellington or Radio 531 PI in Auckland	83	71	14	6
NZ On Air funded music videos which screen TV programmes like 'Squeeze', 'Most Wanted' and 'M2'	75	64	44	38
New Zealand television drama programmes made with the help of NZ On Air [Mercy Peak or The Strip] ¹	63	51	64	55
New Zealand comedy programmes made with the help of NZ On Air, [Spin Doctors or Pulp Comedy] ¹	59	55	62	56
New Zealand special interest programmes made with the help of NZ On Air like Praise Be and Asia Down Under	58	56	62	48
Maori radio stations and TV programmes in English	54	52	40	27
New Zealand television arts and performance programmes made with the help of NZ On Air [The Big Art Trip or Space] ¹	52	45	50	38
New Zealand Music programmes on commercial radio stations like "Keeping it Kiwi" and "The Beat Files"	47	29	32	21
Teletext subtitles, on television programmes. These are written words on the screen so people who have difficulty hearing can understand the programmes	46	31	35	26
National Radio including programmes, like Morning Report, and Kim Hill	42	33	48	36
Access radio stations	42	32	25	11
Student radio stations which is music broadcast from university campuses	40	28	23	14
Concert FM, this is the radio station that plays classical music	33	32	38	28
Maori radio stations and TV programmes in Te Reo like Waka Huia, Marae and Te Karere	32	33	24	18
Base:	248	243	722	728

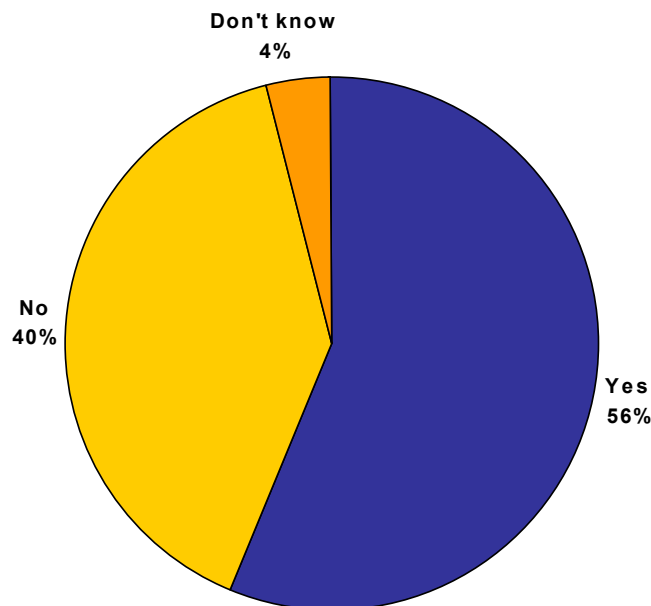
¹ Programme names only used as prompts where necessary

Likelihood to Watch Maori Programmes

People who said they would not, or did not know if they would watch Maori TV programmes in Te Reo like Waka Huia, Marae and Te Karere were asked if they would watch these programmes if they had English subtitles.

Over half of people (56%) said they would watch Maori TV programmes in Te Reo if they had English subtitles.

Would Watch if Maori Programmes in Te Reo Had English Subtitles



Base: 565

- People who said they would watch Maori programmes in Te Reo if they had English subtitles were significantly more likely to be:
 - female
 - from Wellington.
- Males and NZ Europeans were more likely to say they would not watch Maori programmes if they had English subtitles.

Likelihood to Watch Maori Programmes - Results of Pacific Peoples Compared with Non Pacific Peoples

There was no significant differences evident between Pacific Peoples and non Pacific Peoples likelihood to watch Maori programmes in Te Reo if they had English subtitles.

	Pacific Peoples %	Non Pacific Peoples %
Yes	56	55
No	41	41
Don't know	2	4
Base: Not watch Maori programmes in Te Reo	169	546

7.4 NZ On Air Programme Viewing Behaviour

People were asked which of a list of programmes, made with the help of NZ On Air, they had watched. Those who had watched the programme were asked whether they enjoyed the programme.

While Inside New Zealand and Documentary New Zealand remain the most watched NZ On Air funded programmes, significantly fewer people said they enjoyed it compared with 2002 (although enjoyment levels remain relatively high).

Significantly more people reported watching Street Legal, Spin Doctors, Mercy Peak, Sticky TV, Being Eve, Mercury Lane and Willy Nilly compared with a year ago.

	Watched		Enjoyed (Like 1-2)	
	2003 %	2002 %	2003 %	2002 %
Inside New Zealand	89	90	85	89
Documentary New Zealand	88	90	86	90
What Now	64	-	61	-
Colonial House	63	-	64	-
Street Legal	54	44	62	57
Spin Doctors	50	43	51	50
World of Wearable Art Awards	49	-	70	-
Pulp Comedy	49	46	67	63
Our New Zealand	48	-	79	-
Mercy Peak	47	41	58	59
Mobil Song Quest	44	-	77	-
Inside Out	42	-	60	-
The Sir Howard Morrison Story	39	-	81	-
Sticky TV	35	18	43	45
Blokes – the kiwi male revealed	34	-	61	-
Secret New Zealand	33	-	71	-
Flipside	33	-	56	-
Showstoppers	32	-	54	-
Some of my best friends are....	31	-	74	-
Space	31	28	57	62
Big Art Trip	30	-	65	-
Being Eve	29	18	49	49
Mataku	28	-	80	-
Queer Nation	28	-	37	-
Big Comedy Gala	27	-	68	-
Mercury Lane	27	14	59	47
Willy Nilly	26	14	63	63
Grassroots Business	24	-	56	-
Pasifika Beats	24	-	51	-
Gang Girls	23	-	72	-
Nga Reo documentary series	23	-	61	-
Squeeze	22	-	47	-

Table Continued

	Watched		Enjoyed (Like 1-2)	
	2003 %	2002 %	2003 %	2002 %
Life Goes On	20	-	56	-
Stickmen – when screened on TV	17	-	77	-
The Living Room	16	-	63	-
Haka Time	15	-	57	-
Wannabes Duos	14	-	46	-
Stadium Spectacular	13	-	70	-
Titless Wonders	11	-	63	-
So you think you're funny	11	-	56	-
Open Door	10	-	56	-
The Mix	5	-	61	-

NB. This list contains only a selection of NZ On Air funded programmes.

Refer to the appendix for a detailed list of the level of enjoyment of each of these programmes.

Factor analysis again shows that there are distinct groups who like to watch similar groups of programmes. In this instance there are three clear groups defined: Youth, Special Interest and TV One viewers. The table below shows the types of programmes that these groups tend to watch. It also shows the percentage of people who said they liked that particular programme.

Overall, it appears that TV One viewers are relatively satisfied with the range of programmes they watch, followed closely by the Special Interest Viewers. Youth, however, appear to be least satisfied with the programmes they watch, suggesting that NZ On Air is not currently meeting the needs of youth as well as it could.

YOUTH		SPECIAL INTEREST VIEWERS	
❖ What Now	61%	❖ Inside Out	60%
❖ Squeeze	47%	❖ Haka Time	57%
❖ Queer Nation	37%	❖ The Mix	61%
❖ Big Comedy Gala	68%	❖ Pasifika Beats	51%
❖ Street Legal	62%	❖ Open Door	56%
❖ Sticky TV	43%	❖ The Living Room	63%
❖ Space	57%	❖ Grassroots Business	56%
❖ Being Eve	49%	❖ Stadium Spectacular	70%
❖ Pulp Comedy	67%	❖ World of Wearable Art Awards	70%
❖ Wannabes Duos	46%	❖ Nga Reo Documentary	61%
❖ Showstoppers	54%	❖ Our New Zealand	79%
❖ Flipside	56%	❖ Titleless Wonders	63%
		❖ Life Goes On	56%
		❖ Secret New Zealand	71%

'TV ONE' VIEWERS	
❖ Documentary NZ	86%
❖ Inside NZ	85%
❖ Big Art Trip	65%
❖ Spin Doctors	51%
❖ Willy Nilly	63%
❖ Mercy Peak	58%
❖ Mercury Lane	59%
❖ Mobil Song Quest	77%
❖ Some of my Best Friends Are...	74%
❖ Colonial House	64%
❖ Blokes – the Kiwi Male Revealed	61%
❖ The Sir Howard Morrison Story	81%

NZ On Air Programme Viewing Behaviour - Results of Pacific Peoples Compared with Non Pacific Peoples

The viewing behaviour of Pacific Peoples is quite different from non Pacific Peoples with Pacific Peoples being significantly more likely to watch:

- Inside Out
- Pasifika Beats
- Queer Nation
- The Living Room
- Pulp Comedy
- Wannabes Duos
- Showstoppers
- Squeeze
- Flipside
- Street Legal
- What Now?
- Haka Time
- Stickmen
- Mataku
- Big Comedy Gala
- So you think you're funny
- Sticky TV
- Space
- Being Eve
- Gang Girls
- Life Goes On

Non Pacific Peoples were significantly more likely to watch:

- Documentary New Zealand
- Spin Doctors
- Willy Nilly
- Mercy Peak
- World of Wearable Art Awards
- Mobil Song Quest
- Big Art Trip
- Some of my best friends are...
- Colonial House
- Blokes – the kiwi male revealed
- The Sir Howard Morrison Story

Enjoyment of these programmes, however, was relatively similar with Pacific Peoples being significantly more likely to enjoy performance type programmes such as Pasifika Beats, Wannabes Duos and Showstoppers as well as Sticky TV.

Non Pacific People were significantly more likely to enjoy Mercy Peak and Secret New Zealand.

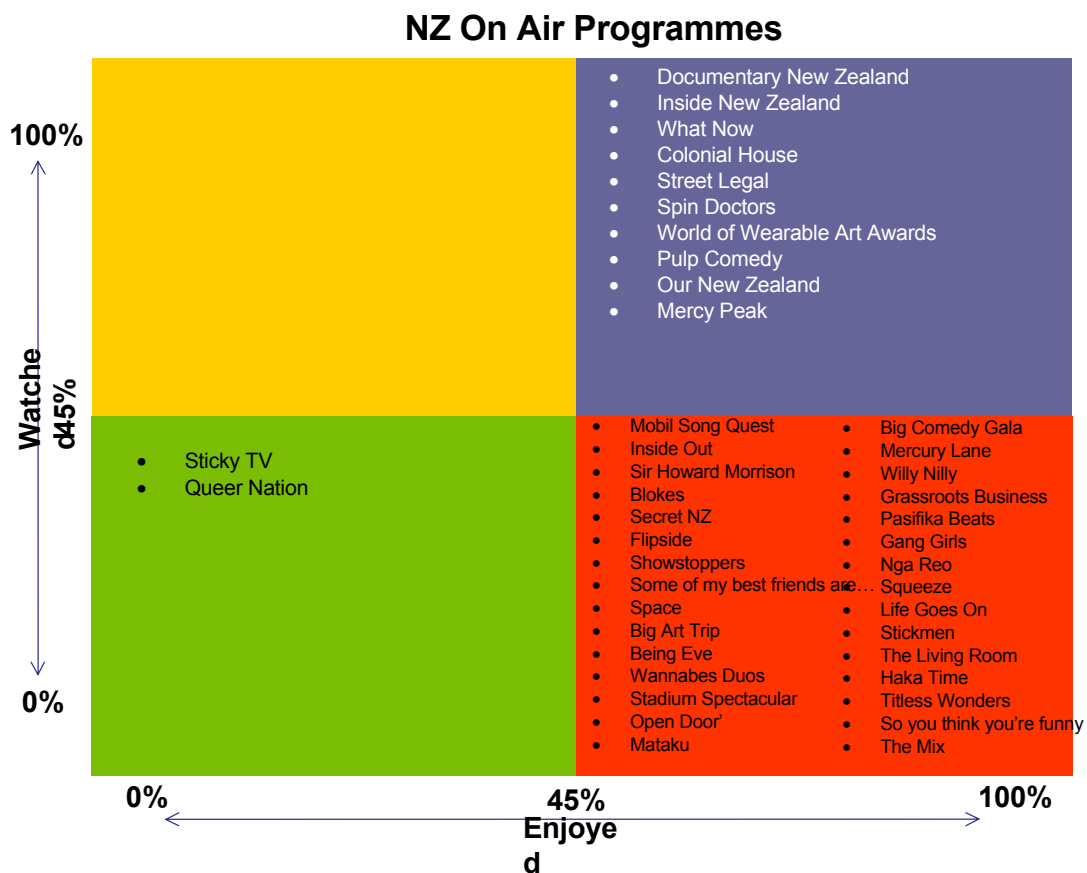
Full results are shown in the table overleaf.

	Pacific Peoples		Non Pacific Peoples	
	Watched %	Enjoyed (Like 1-2) %	Watched %	Enjoyed (Like 1-2) %
Inside New Zealand	90	84	89	85
What Now	84	62	63	60
Documentary New Zealand	72	82	89	86
Street Legal	72	56	53	61
Sticky TV	71	57	33	42
Showstoppers	68	70	30	51
Pulp Comedy	67	65	48	67
Flipside	60	63	32	56
Pasifika Beats	59	77	23	50
Squeeze	58	51	21	46
Space	56	52	30	56
Mataku	56	78	27	80
Being Eve	50	49	27	49
Inside Out	48	56	41	59
Queer Nation	48	43	27	36
Our New Zealand	41	75	47	79
Life Goes On	38	61	19	56
World of Wearable Art Awards	37	75	50	70
Mercy Peak	37	45	48	58
Colonial House	36	53	63	64
Stickmen – when screened on TV	36	70	16	75
Big Comedy Gala	34	68	27	69
Gang Girls	33	68	23	71
Wannabes Duos	33	60	13	41
Spin Doctors	31	40	51	51
The Sir Howard Morrison Story	30	76	39	81
Secret New Zealand	28	57	34	72
Blokes – the kiwi male revealed	26	61	34	61
Nga Reo documentary series	26	70	22	60
The Living Room	26	68	15	62
Mobil Song Quest	25	68	45	77
Haka Time	25	60	14	55
Mercury Lane	22	48	27	59
Grassroots Business	21	65	23	54
Big Art Trip	19	73	30	65
So you think you're funny	19	62	11	54
Some of my best friends are....	18	67	31	73
Willy Nilly	17	63	26	63
Open Door	13	66	9	54
Stadium Spectacular	11	71	13	68
Titless Wonders	9	68	11	62
The Mix	8	38	5	62

Analysis of Popularity to Enjoyment

In the chart below, each programme has been plotted on the basis of how many people watched and how many enjoyed it. Programmes in the top right quadrant had been watched by a large number of people and had a high level of enjoyment. Those in the bottom right had been watched by fewer people but still enjoyed, while those in the bottom left quadrant had been watched and enjoyed by fewer people.

Interestingly, 10 programmes made it into the top right quadrant (i.e. being highly watched and highly enjoyed) in 2003, compared with only six in 2002.



Points to consider regarding viewing behaviour and enjoyment:

- Viewers were asked which programmes they had ever watched, not which they view regularly.
- Long running programmes (e.g. What Now?) have had more opportunity to be viewed by respondents than newer programmes.
- Respondents viewing behaviour and enjoyment levels may not correspond to the ratings data.

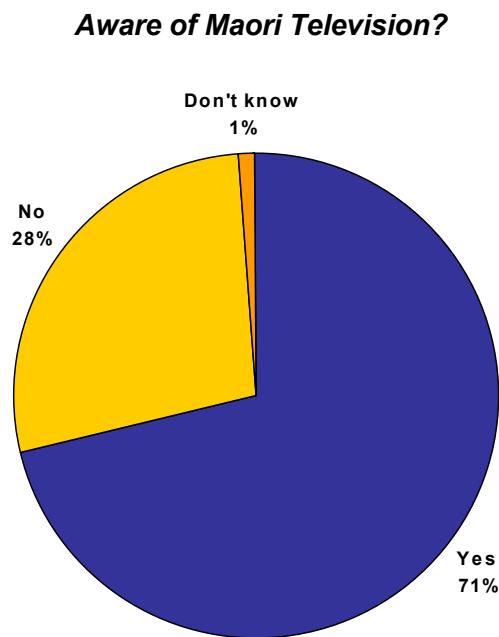
8.0

Maori Television

8.0 Maori Television

8.1 Awareness of Maori Television Channel

People were asked if they were aware of the plans for a new Maori television channel. As can be seen in the graph below, three in four New Zealanders (71%) were aware of plans for the new Maori channel.



Base: 750

- Those people **aware** of plans for the Maori Television Channel were significantly *more* likely to be:
 - aged 45 years or older
 - of European ethnicity
 - an older couple/single
 - aware of NZ On Air.
- Those people **unaware** of plans for the Maori Television Channel were significantly *more* likely to be:
 - aged 18-34 years
 - a young single/couple or family.

Awareness of Maori Television Channel - Results of Pacific Peoples Compared with Non Pacific Peoples

Non Pacific Peoples (71%) were significantly more likely than Pacific Peoples (39%) to be aware of the planned Maori television channel. Over half of Pacific Peoples interviewed (60%) were unaware of the proposed Maori channel.

Awareness of Maori Television

	Pacific Peoples %	Non Pacific Peoples %
Yes	39	71
No	60	27
Don't know	2	1
Base:	248	722

8.2 Perceived Role of Maori Television

People aware of the proposed Maori channel were asked to identify the key role of the channel.

Approximately one in three New Zealanders aware of the plan believe that the channel's role is to provide exposure to Te Reo Maori, either through promotion (23%) or broadcasting programmes in the language (11%). A similar proportion see it to be the provision of 'Maori interest programmes' (22%) or 'programmes for Maori people' (11%).

One in ten perceive the channel to be a communications tool for 'promoting Maori culture' (11%) and 'Tikanga Maori' (6%). A small minority of New Zealanders (4%) were more cynical, claiming that the key role was to 'lose taxpayers money'.

Just under one third of people (29%) didn't know what the key role of the channel would be.

Key Role of Maori Television

	%
Promote Te Reo Maori	23
Broadcast Maori interest programmes	22
Broadcast programmes in Te Reo Maori	11
Promote Maori culture	11
Provide programmes for Maori people	10
Promote Tikanga Maori	6
Educational	5
Losing taxpayers money	4
Entertainment	1
Information to everyone in general	1
Quality Maori programming	1
Provide jobs	1
Don't know	29
Base: Aware of Maori TV	531

- There were no significant differences between the key demographic groups with regard to the key roles of the planned Maori channel.

Perceived Roles of Maori Television - Results of Pacific Peoples Compared with Non Pacific Peoples

Non Pacific Peoples were significantly more likely than Pacific People to say 'promoting Maori culture' was a key role of the proposed channel. (11% compared to 3%). Though not significantly different, Pacific Peoples were more likely than Non Pacific Peoples to identify the following as key roles of the Maori channel:

- promoting Te Reo Maori
- providing programmes for Maori people
- promoting Tikanga Maori.

Key Role of Maori Television

	Pacific Peoples %	Non Pacific Peoples %
Promote Te Reo Maori	33	23
Broadcast Maori interest programmes	17	23
Provide programmes for Maori people	14	9
Promote Tikanga Maori	14	6
Broadcast programmes in Te Reo Maori	9	12
Educational	5	5
Promote Maori culture	3	11
Provide jobs	3	1
Information to everyone in general	2	1
Losing taxpayers money	-	4
Entertainment	-	1
Quality Maori programming	-	1
Don't know	25	28
Base: Aware of Maori TV	96	516

8.3 Importance of Maori Television

All respondents were asked to rate how important it is to have a Maori television channel, on a five-point scale ranging from 'very important' (1) to 'very unimportant' (5). The results are shown in the table below.

Opinion on the importance of the proposed channel was divided, with a similar proportion of people rating the channel either 'very important' or 'important' (40%) as those who felt it was 'very unimportant' or 'unimportant' (37%). Opinion on the channel also appears to be strongly polarised, with almost half of respondents saying it was either 'very important' (22%) or 'very unimportant' (25%) that NZ have such a channel.

One in five people sat on the fence (22%), saying it was 'neither important nor unimportant' that a Maori channel be offered on television.

Importance of Maori Television Channel

	%
Very important	22
Important	18
Total important	40
Neither important nor unimportant	22
Unimportant	12
Very unimportant	25
Total unimportant	37
Don't know	1
Base:	750

- Those people who rated the Maori television channel 'very important' or 'important' were significantly *more* likely to be:
 - from Auckland
 - aged 18-34 years
 - Maori.
- Those people who rated the Maori television channel 'very unimportant' or 'unimportant' were significantly *more* likely to be:
 - from Christchurch
 - aged 55 years or older
 - of European ethnicity
 - an older couple/single.

Importance of Maori Television Channel - Results of Pacific Peoples Compared with Non Pacific Peoples

Despite being less aware of the proposed channel, Pacific Peoples were significantly more likely to consider it both 'very important' (32% compared to 21%) and important overall (48% compared to 39%) that NZ has a Maori television channel. Conversely, Non Pacific Peoples were significantly more likely to consider the channel 'very unimportant' (25% compared to 19%) and therefore unimportant overall (37% compared to 31%).

Importance of Maori Television Channel

	Pacific Peoples %	Non Pacific Peoples %
Very important	32	21
Important	16	18
Total important	48	39
Neither important nor unimportant	21	23
Unimportant	13	12
Very unimportant	19	25
Total unimportant	31	37
Don't know	-	1
Base:	248	722

8.4 Proportion of English on Maori Television

All people interviewed were asked what proportion of programming on Maori Television should offer English subtitles or be presented in English.

As can be seen in the table below, almost half of all people (45%) want the majority of programming (76-100%) to be in English or offer English subtitles. This suggests that many New Zealanders could at least be interested in watching programmes of interest to them on the proposed channel (if the programme was understandable).

At the other end of the scale, one in ten (10%) want to see minimal use of the English language (between 0-10 percent of programming), suggesting that they feel the channel should only target Maori (specifically those who speak Te Reo Maori).

Proportion of English or English Subtitles on Maori Television

	%
0-10%	10
11-15%	1
16-20%	2
21-25%	2
26-34%	1
35-50%	18
51-75%	7
76-100%	45
Don't know	14
Base:	750

- Males were significantly *more* likely than females to want 0-10 percent of programming on the Maori channel to be in English.
- Those people who want 35-50 percent of programming on the Maori channel to be in English were significantly *more* likely to be:
 - a young family
 - living in an urban area.
- Those people who want 76-100 percent of programming on the Maori channel to be in English were significantly *more* likely to be:
 - living in the Auckland Metropolitan area
 - aware of NZ On Air.

Proportion of English or English Subtitles on Maori Television - Results of Pacific Peoples Compared with Non Pacific Peoples

Overall, Pacific Peoples would like to see less programmes on the Maori channel in English or offering English subtitles than Non-Pacific Peoples. Almost half of Non-Pacific Peoples interviewed (46%) would like to see the majority of programmes (76-100%) offering English commentary or subtitles, a proportion significantly higher than Pacific Peoples (33%).

However, two-thirds of Pacific Peoples (68%) would like to see 35 percent or more of programmes on Maori television in English, indicating that this group could also be interested in viewing certain programmes on the Maori channel.

Proportion of English or English Subtitles on Maori Television

	Pacific Peoples %	Non Pacific Peoples %
0-10%	8	10
11-15%	3	1
16-20%	3	2
21-25%	2	1
26-34%	5	2
35-50%	28	18
51-75%	7	7
76-100%	33	46
Don't know	11	14
Base:	248	722

8.5 Usage of Maori Television

All people were asked to rate on a five-point scale, from very likely (1) to very unlikely (5), how likely it would be that they would watch programmes broadcast on the Maori channel when it comes on air.

As can be seen in the table below, one quarter of respondents (24%) thought it was likely they would watch programmes on the Maori channel, with an even split of those 'very likely' and 'likely' (both 12% respectively). A further 21 percent considered it 'neither likely nor unlikely'. This means that just under half (45%) are, at the very least, not opposed to watching programmes on the Maori channel.

Over half of all people interviewed (54%) considered it unlikely that they would tune in to the new channel, with the majority of this group (39%) having a strong opinion (i.e. rated it 'very unlikely' that they would watch programmes on the new Maori channel).

Likelihood of Watching Programmes Broadcast on the Maori Channel

	%
Very likely	12
Likely	12
Total likely	24
Neither likely nor unlikely	21
Unlikely	14
Very unlikely	39
Total unlikely	54
Don't know	2
Base:	750

- Those people who rated it 'very likely' or 'likely' that they would watch the Maori television channel were significantly *more* likely to be:
 - aged 35-44 years
 - Maori.
- Those people who rated it 'very unlikely' or 'unlikely' that they would watch the Maori television channel were significantly *more* likely to:
 - be from Christchurch
 - be aged 55years or older
 - be of European ethnicity
 - not think NZ On Air helps buy overseas made programmes.

Likelihood to Watch Maori Television Channel - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific Peoples were significantly more likely than Non-Pacific Peoples to rate it 'very likely' that they would watch programmes on Maori channel (20% compared to 11%), and also more likely overall to watch the new channel (29% compared to 24%), though this difference was not statistically significant. This greater likelihood to watch the new channel makes intuitive sense given Pacific Peoples were more likely to agree that the channel was important for New Zealand to have.

Non-Pacific Peoples (40%) were significantly more likely than Pacific Peoples (32%) to consider it 'very unlikely' they would watch programmes on the Maori channel.

Likelihood of Watching Programmes Broadcast on the Maori Channel

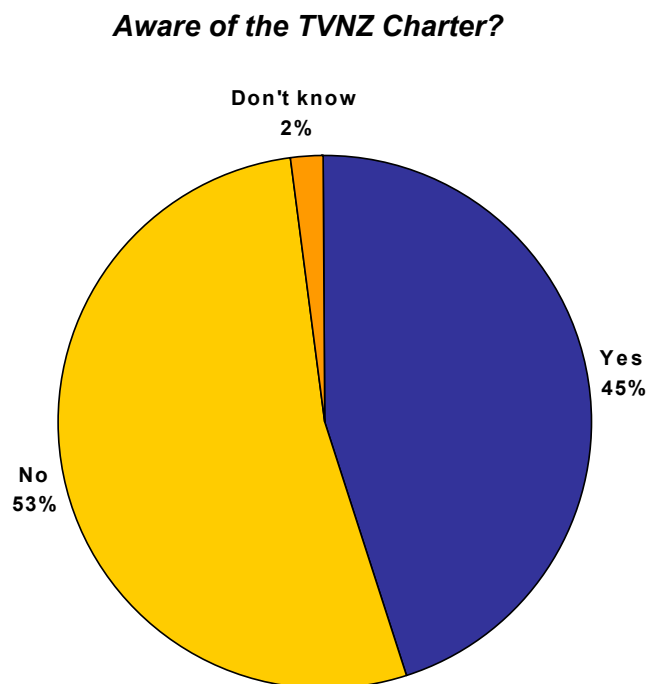
	Pacific Peoples %	Non Pacific Peoples %
Very likely	20	11
Likely	9	12
Total likely	29	24
Neither likely nor unlikely	22	20
Unlikely	15	14
Very unlikely	32	40
Total unlikely	48	54
Don't know	2	2
Base:	248	722

9.0 TVNZ Charter

9.0 TVNZ Charter

9.1 Awareness of TVNZ Charter

People were asked if they were aware that Television New Zealand (TVNZ) has a charter that guides its business and choice of programming. As shown in the graph below, just over two-fifths of people (45%) were aware of the charter. Over half (53%) said they had never heard of the charter and two percent did not know if they had heard of the charter or not.



Base: 750

- Those people **aware** of the TVNZ charter were significantly *more* likely to:
 - be aged 45-54 years
 - be of European ethnicity
 - be aware of NZ On Air
 - not think NZ On Air helps buy overseas made programmes.
- Those people **unaware** of the TVNZ charter were significantly *more* likely to be:
 - aged 18-34 years
 - of an 'other' ethnicity.

Awareness of TVNZ Charter - Results of Pacific Peoples Compared with Non Pacific Peoples

Awareness of the TVNZ charter was significantly higher among Non-Pacific Peoples (46% compared to 21% for Pacific Peoples). Three quarters of Pacific Peoples (75%) were not aware of the TVNZ charter.

Aware of the TVNZ Charter?

	Pacific Peoples %	Non Pacific Peoples %
Yes	21	46
No	75	52
Don't know	4	2
Base:	248	722

Comparison of Awareness of the TVNZ Charter Between 2001 and 2003

The table below compares awareness of the Television New Zealand charter between 2001 and 2003. Significantly more people in 2003 are aware of the current Television New Zealand charter.

Please note, in 2001 people were asked if they were aware the Government had designed a new charter for Television New Zealand to guide its business and choice of programming, before the charter was imposed. In 2003, people were asked if they were aware of the charter currently in force.

Comparison of Awareness Between 2001 and 2003

	2003 %	2001 %
Yes	45	37
No	53	60
Don't know	2	3
Base:	750	750

9.2 Impact of the TVNZ Charter

People aware of the charter were asked how it has changed television. The results are shown in the table below.

One in six people (16%) felt that the charter has led to more NZ/locally made programmes on television. One in ten (9%) said that it has resulted in better quality programming. Two percent of people said there is a bigger selection of programmes available now.

Whilst most comments were positive, a small proportion felt that the charter has resulted in worse/boring programmes (2%) and Government control/propaganda (1%).

One in five people (19%) said that there had been no noticeable change since the charter. Just under half (46%) didn't know how the charter had changed television.

How Has the Charter Changed Television?
- mentioned by one percent or more of respondents -

	2003 %
More NZ made programmes/locally made	16
Better quality programming	9
Worse/boring programmes	2
Bigger selection of programmes	2
Better programmes	1
Fewer ads	1
Balanced viewing	1
Government control/propaganda	1
Programmes will have ratings displayed	1
Gives direction/keeps it on track	1
Makes it easier to complain	1
No change	19
Don't know	46
Base: Aware of Charter	336

- zero

- Older couples/singles were significantly *more* likely to feel that the TVNZ charter has made **no change** to NZ television.
- People living in an urban area were significantly *more* likely to feel that the TVNZ charter has led to more NZ/locally made programmes.

Impact of the TVNZ Charter - Results of Pacific Peoples Compared with Non Pacific Peoples

There were no significant differences between Pacific and Non-Pacific peoples with regard to changes in television as a result of the TVNZ charter. Overall however, Pacific Peoples were slightly less likely to identify a particular change in television brought about by the charter.

How Has the Charter Changed Television? - mentioned by one percent or more of respondents -

	Pacific Peoples %	Non Pacific Peoples %
More NZ made programmes/locally made	9	16
Better quality programming	13	8
Worse/boring programmes	2	2
Bigger selection of programmes	-	2
Better programmes	-	2
Fewer ads	-	1
Balanced viewing	-	1
Government control/propaganda	-	1
Programmes will have ratings displayed	2	1
Gives direction/keeps it on track	-	1
Makes it easier to complain	-	1
No change	21	18
Don't know	53	46
Base: Aware of Charter	53	331

Expected Versus Actual Impact of the TVNZ Charter

The table below compares the expected impact of the charter on television in 2001 and the actual impact the charter has had on television in 2003. Compared to the expected impact reported in 2001, significantly more people said the charter has resulted in better quality programming in 2003 (9% actual, compared to 4% expected in 2001).

Significantly fewer people in 2003 said that the charter has resulted in fewer ads on television (1% actual, compared to 6% expected in 2001) and Government control/propaganda (1% actual, compared to 4% expected in 2001).

Expected Versus Actual Impact of the Charter on New Zealand Television

	Actual 2003 %	Expected 2001 %
More NZ made programmes/locally made	16	18
Better quality programming	9	4
Worse/boring programmes	2	7
Bigger selection of programmes	2	-
Better programmes	1	3
Fewer ads	1	6
Balanced viewing	1	-
Government control/propaganda	1	4
Programmes will have ratings displayed	1	-
Gives direction/keeps it on track	1	-
Makes it easier to complain	1	-
More special interest or minority programmes	-	4
Less overseas programmes	-	4
More Maori programmes	-	2
Less popular/fewer new programmes	-	2
Will have more ads to pay for the funding	-	2
No change	19	-
Don't know	46	47
Base: Aware of Charter	336	276

All people aware of the TVNZ charter were read a list of possible changes that may have occurred as a result of the charter and asked whether or not they felt the change **had** occurred.

As shown in the table below, approximately half of those people aware of the charter agreed that it has led to 'more programmes reflecting the diversity of NZ' (47%) and 'more local programming overall' (47%). Around two in five people said that it has led to 'more programmes that include Maori elements' (44%), 'more in-depth news and current affairs coverage' (41%) and 'better quality local programming overall' (40%).

Only one in ten people (12%) said that the TVNZ charter has led to 'fewer adverts' on television.

One in five people (19%) said that they had noticed none of these changes since the introduction of the charter.

Changes in Television as a Result of the TVNZ Charter

	Yes %
More programmes reflecting the diversity of New Zealand	48
More local programming overall	47
More programmes that include Maori elements	44
More in depth news and current affairs coverage	41
Better quality local programming overall	40
More arts programming	37
Better television overall	33
Television is more enjoyable	29
Better time slots for special interest programmes	29
More high quality international programming	26
Fewer adverts	12
None of these	19
Base: Aware of Charter	336

- Those people who agreed with many of the statements regarding change as a result of the TVNZ charter were significantly *more* likely to:
 - be aged 35-44 years of age
 - think that NZ On Air helps buy overseas made programmes.

Impact of the TVNZ Charter - Results of Pacific Peoples Compared with Non Pacific Peoples

Pacific People were significantly more likely than Non-Pacific Peoples to agree that television has improved, both quality (47%) and enjoyment wise (45%) as a result of the TVNZ charter. Pacific Peoples were also significantly more likely to agree that the charter has led to fewer adverts (26% compared to 12%).

Conversely, Non-Pacific Peoples appear to be a little more cynical of the effectiveness of the TVNZ charter, with a significantly higher proportion having noticed none of the mentioned changes (19% compared to 9%).

Changes in Television as a Result of the TVNZ Charter

	Pacific Peoples %	Non Pacific Peoples %
More programmes reflecting the diversity of New Zealand	34	48
More local programming overall	36	47
More programmes that include Maori elements	32	44
More in depth news and current affairs coverage	43	40
Better quality local programming overall	42	40
More arts programming	36	37
Better television overall	47	32
Television is more enjoyable	45	28
Better time slots for special interest programmes	34	29
More high quality international programming	34	25
Fewer adverts	26	12
None of these	9	19
Base: Aware of Charter	53	331

Actual Versus Expected Changes in Television as a Result of the TVNZ Charter

The table below compares the expected impact of the charter on television in 2001 and the actual impact the charter in 2003 has had on television. Compared to the expected changes reported in 2001, significantly fewer people said the charter has resulted in any of the changes asked about in 2003.

Actual Versus Expected Changes in Television as a Result of the TVNZ Charter

	Actual 2003 %	Expected 2001 %
More programmes reflecting the diversity of New Zealand	48	83
More local programming overall	47	83
More programmes that include Maori elements	44	69
More in depth news and current affairs coverage	41	66
Better quality local programming overall	40	64
More arts programming	37	64
Better television overall	33	53
Television is more enjoyable	29	44
Better time slots for special interest programmes	29	68
More high quality international programming	26	50
Fewer adverts	12	54
None of these	19	-
Base: Aware of Charter	336	276

Appendix

Sample Profile

	2003 %	2002 %	2001 %	2000 %	1999 %
Gender					
Male	37	38	37	37	40
Female	63	64	63	63	60
Age					
18-24 years	11	9	9	9	10
25-34 years	18	21	20	22	20
35-44 years	23	23	24	24	28
45-54 years	18	17	21	20	16
55-64 years	15	14	12	13	14
65+ years	14	15	14	12	13
Refused	*	*	*	*	1
Ethnicity					
New Zealand European	78	81	79	82	80
Maori	8	8	8	8	6
Pacific Islander	4	3	4	3	2
Other	10	8	9	7	12
Employment Status					
Employed full time	53	53	49	51	51
Employed part time	13	15	17	17	11
Retired	16	17	18	15	19
Home maker	5	6	7	8	8
Student	7	5	6	6	6
Unemployed	4	3	3	3	4
Don't know/refused	1	1	*	2	1
Highest Education Level					
School	45	49	49	52	48
Technical	18	17	15	17	16
University	34	31	31	28	29
Other	-	*	2	1	4
Refused	2	3	-	1	3
Household Structure					
Young - single/couple/group flatting	19	17	16	16	19
Young family	32	35	34	33	31
Mature family	18	18	20	21	18
Older couple/single	29	30	29	29	31
Refused	1	1	-	1	1
Base:	750	751	750	750	750

Sample Profile continued

	2003 %	2002 %	2001 %	2000 %	1999 %
Area					
Whangarei	2	2	2	2	2
Auckland	37	37	37	37	37
Hamilton	6	6	6	6	6
Tauranga	4	4	4	4	4
Rotorua	2	2	2	2	2
Gisborne	1	1	1	1	1
Napier	2	2	2	2	2
Hastings	2	2	2	2	2
New Plymouth	2	2	2	2	2
Wanganui	2	2	2	2	2
Palmerston North	3	3	3	3	3
Wellington	14	14	14	14	14
Nelson	2	2	2	2	2
Christchurch	14	14	14	13	14
West Coast	-	-	-	1	-
Dunedin	5	5	5	5	5
Invercargill	2	2	2	2	2
Area Status					
Urban	72	74	71	70	71
Secondary	8	7	7	6	7
Minor urban	10	9	12	12	12
Rural	11	10	11	12	10
Household Income					
Less than \$15,000	7	8	7	8	14
\$15,001 – \$25,000	12	10	9	11	12
\$25,001 – \$35,000	11	12	13	12	11
\$35,001 – \$45,000	14	10	12	14	13
\$45,001 – \$55,000	10	7	9	11	8
\$55,001 – \$70,000	9	11	10	9	9
\$70,001 – \$85,000	5	6	6	6	4
\$85,001 +	12	12	12	11	10
Don't know/Refused	20	24	22	20	19
Base:	750	751	750	750	750

Rating of Enjoyment of NZ On Air Programmes

	Like a lot %	2	3	4	Dislike a lot %	Don't know %
Documentary New Zealand	61	25	12	2	1	-
Inside New Zealand	57	28	12	1	-	1
The Sir Howard Morrison Story	51	29	16	1	1	2
Mataku	48	32	13	1	2	3
Our New Zealand	48	31	15	2	1	3
Stickmen – when screened on TV	45	32	20	2	1	2
Gang Girls	42	29	18	6	3	1
Mobil Song Quest	41	37	18	3	1	-
World of Wearable Art Awards	39	32	19	7	3	1
Stadium Spectacular	39	31	17	4	4	5
Some of my best friends are....	36	38	18	3	2	3
Titless Wonders	36	26	19	6	3	10
What Now	35	26	28	6	3	3
Big Comedy Gala	35	33	19	4	3	5
Colonial House	34	30	24	8	3	1
Willy Nilly	34	29	22	9	4	2
Pulp Comedy	32	36	19	7	5	1
Secret New Zealand	31	40	22	3	-	3
So you think you're funny	31	25	28	7	2	6
Street Legal	30	32	27	7	2	1
Nga Reo documentary series	30	31	27	5	2	5
Showstoppers	29	26	31	7	5	3
The Living Room	29	33	25	8	3	2
Haka Time	29	29	29	4	4	5
Big Art Trip	29	36	27	5	2	1
The Mix	29	32	15	12	2	10
Open Door	28	28	24	7	7	7
Space	26	31	22	12	6	3
Inside Out	26	34	24	6	2	8
Mercy Peak	26	31	29	8	4	1
Wannabes Duos	25	21	34	8	6	7
Blokes – the kiwi male revealed	25	36	26	6	4	4
Grassroots Business	25	31	29	5	4	6
Mercury Lane	24	35	26	8	2	5
Pasifika Beats	23	28	36	4	1	7
Spin Doctors	23	28	31	10	6	2
Life Goes On	20	36	31	7	1	5
Sticky TV	19	23	38	9	8	2
Flipside	19	37	32	7	2	2
Squeeze	18	29	38	7	5	4
Being Eve	18	31	25	15	7	4
Queer Nation	13	23	31	17	11	4

Spontaneous Recall of NZ On Air Programmes
(Programmes Mentioned by Less than Half a Percent)

- » Sports Café
- » Night Line
- » Flipside
- » Monday Documentary
- » Number 8 Wired
- » Pio
- » Ground Force
- » Video Hits
- » Real TV
- » Home Grown
- » Jackson's Wharf
- » NZ Wars
- » Havoc and Newsboys Sellout Tour
- » Nine to Noon
- » Strassman
- » Mucking In
- » Te Reo
- » Crime Watch
- » Gliding On
- » Give it a Whirl
- » Epitaph
- » Telstra Business
- » Ready Steady Cook
- » Police Ten Seven
- » Mitre 10 Changing Rooms
- » Captains Log
- » Asia Dynamic
- » Rural Report
- » Jo Seager's Cooking
- » Topp Twins
- » Mirror Mirror
- » The Pasifika Festival
- » The Zoo
- » Comedy Fest
- » Musical Chairs
- » Wayne Mowat
- » Tuesday Documentary
- » Playschool
- » The Great NZ Video Show
- » Eyewitness
- » Border Patrol
- » Wearable Art Awards
- » Willy Nilly
- » Spectrum
- » Wild South
- » Real Life Documentary

Questionnaire

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