

# Local 20004

New Zealand Television

# Content

# Local 2004

New Zealand Television

## Content

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# Chairman's introduction

NZ On Air has the promotion of New Zealand culture and identity, through broadcasting, at the core of its legislation. For sixteen years it has been our mission not only to fund a range of locally made programmes, but to argue on behalf of local content's place and importance on our televisions and in our culture.

Every year since 1990, we have conducted a survey of the local content appearing on our television screens. While this survey is quantitative in nature, the examination of trends by programme genre gives something of a qualitative flavour, in the sense that it measures the diversity in New Zealanders' television diet.

Over these sixteen years, the number of channels transmitting to New Zealand audiences has proliferated. While the report continues to focus on the main national free-to-air networks, additional information has been added in recent years to outline the level and type of local content available through services such as Sky Television and the regional channels. Thus, while local content as a percentage of transmission on TV One, TV2 and TV3 has grown relatively slowly overall, its presence - even as a small percentage of programming - across a range of outlets is increasing.

With digital broadcasting leading to channel proliferation and the likely introduction of new platforms, this trend should increase. We know, however, that many niche or new channels do not buy or commission much, if any, local programming, as purchasing on the international market is significantly cheaper. The challenge for the future will be to try to find ways of ensuring local programming remains visible and accessible to audiences where they are watching.

Last year was another significant one for local content and public service broadcasting in New Zealand. The Maori Television Service (MTS) was launched in March, and has carved out a solid niche in its first year, with critical acclaim and a growing audience of both Maori and non-Maori. Its strong focus on programming by, for and about Maori - and especially in Te Reo - has added an important new dimension to local content in this country.

TVNZ, for its part, has now completed its second year of operation under the guidance of its Charter, which requires it to, "feature programming that serves the varied interests and informational needs and age groups within New Zealand society, including tastes and interests not generally catered for by other national broadcasters" and "support and promote the talents and creative resources of New Zealanders and of the independent New Zealand film and television industry." The charter thus provides a further crucial mechanism for delivering a diverse range of public service programming to New Zealanders.

In 2003, the Television Local Content Group (TLC) was set up to establish and monitor appropriate voluntary targets for local content. The TLC comprises TVNZ, TV3, Prime Television, representatives of SPADA and NZ On Air. Now that the Maori Television Service (MTS) has gone to air, it is hoped that MTS will also accept an invitation to join the Group.

During 2004, having increased its UHF transmission coverage to 90% plus of the country, Prime Television began to build its commitment to local programming with news and current affairs coverage, and a modest slate of independent commissions. Having joined the TLC, Prime has committed to transmission and genre targets for 2005. While Prime is not included in the main body of this report, it will be next year.

The Television Local Content Group has agreed that this annual report will be the central document to provide a tool for setting targets and measuring results. To better match the survey to the Group's work, we introduced some changes, by way of transition, to the report last year. These changes, now fully reflected in the 2004 report, can be summarized as reporting transmission figures on an 18-hour clock from 6.00 a.m. to midnight, and grouping genre information in accordance with the four broad categories agreed by the TLC.

So how is local content progressing?

The Television Local Content Group has committed to the following local content baselines for transmission between the hours of 6 am and midnight.

TVOne	52%
TV2	19%
TV3	20%

As this report will show, those targets have effectively been achieved or exceeded for 2004.

TVOne screened 51.6% local content

TV2 screened 24.3%

TV3 screened 21.6%

In 2004, the total amount of local content across the three main national free-to-air channels was 32.6%, for the period six am to midnight, down only slightly from 2003, and the record high level in 2002.

Across the main free-to-air channels, there have been only minor fluctuations from genre to genre. An increase (by 59 hours) in the documentary category went some way to offset a (115 hour) decrease in children's programming, for example.

While the maintenance of a high level of local content is impressive, it also masks an ongoing fragility, particularly in those genres that have higher production costs, or are perceived as having low commercial value. As an example, the 2003 report revealed a good presence of drama on screen, which was maintained in 2004, however a dramatic decline in production during 2004 is likely to be reflected in a similar "see-saw" effect in this category when the next local content report is published. Though new dramas are now being commissioned, not all are likely to go to air this year and some will therefore impact on the figures for that genre in the 2006 report.

In a market the size of New Zealand, it can sometimes be difficult to avoid such fluctuations. The impact on the production sector, on creative talent, and on audience attitudes is significant, however. Those commissioning and funding local programmes for television have a responsibility to plan for the medium and long term as far as possible.

It's important to remember that this report is largely a quantitative measure of local content, although there are some clues in our sub-measures about quality. For example, the report indicates trends in the proportion of total investment by genre: it gives information on which genres are receiving the most investment, and where programmes are placed in the television schedule. But essentially, this report is about how much local content there is on our television screens.

Of special interest to the taxpayer is the level of local content funded by NZ On Air. In last year's survey, we noted an increase in the proportion of the total local content that was funded by this organisation. This year that figure has remained steady, at 23% (for the hours 6 am to midnight). This change reflects the slow and steady growth of our funding budget, in the face of increasing production costs. NZ On Air funding is allocated not only to provide local content, but also to boost the range and diversity of local content that would otherwise be available in a wholly commercial market.

In March 2004 TVNZ Chief Executive Ian Fraser committed to increasing local content across TVOne and TV2 to an average of 50%, to be achieved over a period of four to five years. Government funding for the Charter is likely to go some way towards ensuring this ambitious target can be achieved, but significant additional investment will be needed to sustain it. It is a laudable aim, however, particularly as it would result in up to 1,400 more local content hours per annum. It is likely that evidence of progress towards this target will become more apparent in the 2005 report, when a strategy of boosting TV2's local content, and providing more of a full service on both TV One and TV2, start to fully kick in.

Despite modest increases in both Charter funding to TVNZ, and funding to NZ On Air in the 2004 budget, little impact in terms of programme diversity can be identified in this report. In part, this is due to the lag between programmes being commissioned and their appearance on air. It is also due to our observation that the cost of production has increased - especially in scripted programming - in part, as a result of competition from large budget international projects.

Early 2005 saw the opening rounds in a current affairs battle at 7.00 p.m., with TV3 and Prime launching programmes to compete for TVOne's *Close UP at 7* audience share. This substantial increase in current affairs coverage will be reflected in the news/current affairs category next year. It may be that the commitment required to establish these three programmes in the market will have some impact on the diversity that can be achieved in other genres.

Broadcasting is a medium through which New Zealanders can connect with each other at a national and community level, and differentiate themselves within the global village. This issue of the increasingly one-dimensional nature of images in a globalising world was addressed by Michael D Higgins, in a paper delivered in New Zealand in 1999, who described the impact of the global domination of the world's media by visual images from the United States, and identified our choice as being "whether we become the consumers of images in a passive culture or the makers of images in an active culture...whether we become victims of this 'colonisation of the imagination'".

This report indicates the progress made over the past twelve months. But for an economy the size of New Zealand's, local content will always be a fragile commodity affected by economic cycles, advertising trends and Government policy. To maintain this progress we have to be determined in our acceptance of the challenge to ensure that the faces and voices of New Zealand are seen and heard.

Judy Callingham

Deputy Chair

NZ On Air

**Overview**

- Local content in 2004 decreased by 103 hours compared with 2003 figures.
- Total hours in 2004 were 6423 (compared with 6526 in 2003).
- Local content accounted for 32.6% (33.1% in 2003) of the 6am to midnight broadcast hours.
- TV One screened 51.6% local content for the hours 6am to midnight (54.6% in 2003).
- TV2 screened 24.3% local content for the hours 6am to midnight (24.3% in 2003).
- TV3 screened 21.6% local content for the hours 6am to midnight (20.4% in 2003)
- Prime time local content increased by 19 hours in 2004 (from 1841 in 2003) and comprised 42.3% of the prime time schedule.
- Total first-run local content hours in 2004 increased by 60 hours to reach 5231 (5171 in 2003).

**Main variations (2004 vs. 2003)**

- The main decreases in total hours in 2004 were in the following areas:
  - Information programming was down 156 hours with the most significant decline in TV One repeat programming.
  - Children's hours fell by 115 across both TV2 and TV3. This was a result of increased costs as well as a new NZ On Air funding strategy, which resulted in a reduction in hours for *What Now?* on TV2 and *Sticky TV* on TV3.
  - Sports local content hours declined by 37. Decreases on both TV One and TV2 were offset by an increase on TV3, which recorded the highest hours in this genre since 1994.
  - Maori programming showed a slight decrease of 7 hours to a total of 356 hours.
- Increases in local content hours in 2004 were:
  - Documentary hours increased by 59 with the most significant increase on TV One.
  - Entertainment programming increased by 45 hours due to an increase in prime-time hours on TV2 and the introduction of *Headliners* to the TV One schedule.
  - News and Current Affairs hours were up by 101, attributable mainly to increased off-peak hours on TV One and TV2.
  - Drama and Comedy increased by 29 hours due to an increase in repeat programming on TV2.

### **Channel Output**

- As a percentage of their 6 am to midnight broadcast hours, channel output was as follows:
  - TV One screened 42.5% total first-run local content (43% in 2003)
  - TV2 screened 17.9% total first-run local content (18.4% in 2003)
  - TV3 screened 18.9% total first-run local content (17.3% in 2003 )
- As a percentage of their total prime time hours (6pm-10pm):
  - TV One screened 58.8% local content (60.3% in 2003)
  - TV2 screened 29.6% local content (24.7% in 2003)
  - TV3 screened 38.6% local content (41.1% in 2003)

### **NZ On Air's contribution**

- NZ On Air contributed funding to 23.3% of the total New Zealand hours in 2004, a result consistent with 2003:
- NZ On Air's contribution to both first-run and prime time hours declined in 2004:
  - NZ On Air's contribution to first-run hours decreased by 0.6% - making up 17.8% of total first-run programming in 2004.
  - NZ On Air's contribution to prime time hours decreased by 1.5% - making up 11.7% of total prime time local content in 2004.

### **Measures**

- Hours are measured and reported on an 18-hour clock - as introduced in the 2003 report. This report also reflects the four main genre groupings that are the focus of the Television Local Content Group.
- Total broadcast hours in this survey were 6588 due to 2004 being a leap year.

## Continuing Local Content

The hours of local content on New Zealand's three nationwide channels (TV One, TV2 and TV3) have been measured and reported by NZ On Air since 1990.

From just two channels in 1998 we have moved to a broadcasting environment that now sees five national free-to-air channels sitting alongside a Pay TV offering of over 80 channels from Sky TV, independent free-to-air regional broadcasters the length and breadth of the country as well as the Maori Television Service - launched in March 2004.

The Local Content Group was formed in 2003, with the aim of establishing and monitoring appropriate voluntary quotas for local content. The Local Content Group is made up of TVNZ, TV3, Prime TV and representatives of SPADA and NZ On Air. As an authoritative measure of the status of local content on New Zealand television over the past fifteen years, NZ On Air's Local Content report has become a core resource for the Local Content Group.

In last year's report a changed approach to how local content hours are measured and reported was highlighted. This report reflects the two key changes made:

- Local content is measured in terms of the 18-hour period from 6am - midnight. This is the standard international approach for measuring local content levels, and moving to the 18-hour clock allows us to make meaningful comparisons with other countries, most notably Australia where all commercial broadcasters are required to meet a local content quota of 55% across the 6am to midnight schedule.
- The report, as well as looking at nine distinct genres, also reflects the four main genre groupings that are the focus of the Local Content Group - Drama and Comedy (including Children's Drama); Children's; Documentary, Information and Entertainment; News and Current Affairs and Sport.



# 4

## 2004 Results - Total Hours

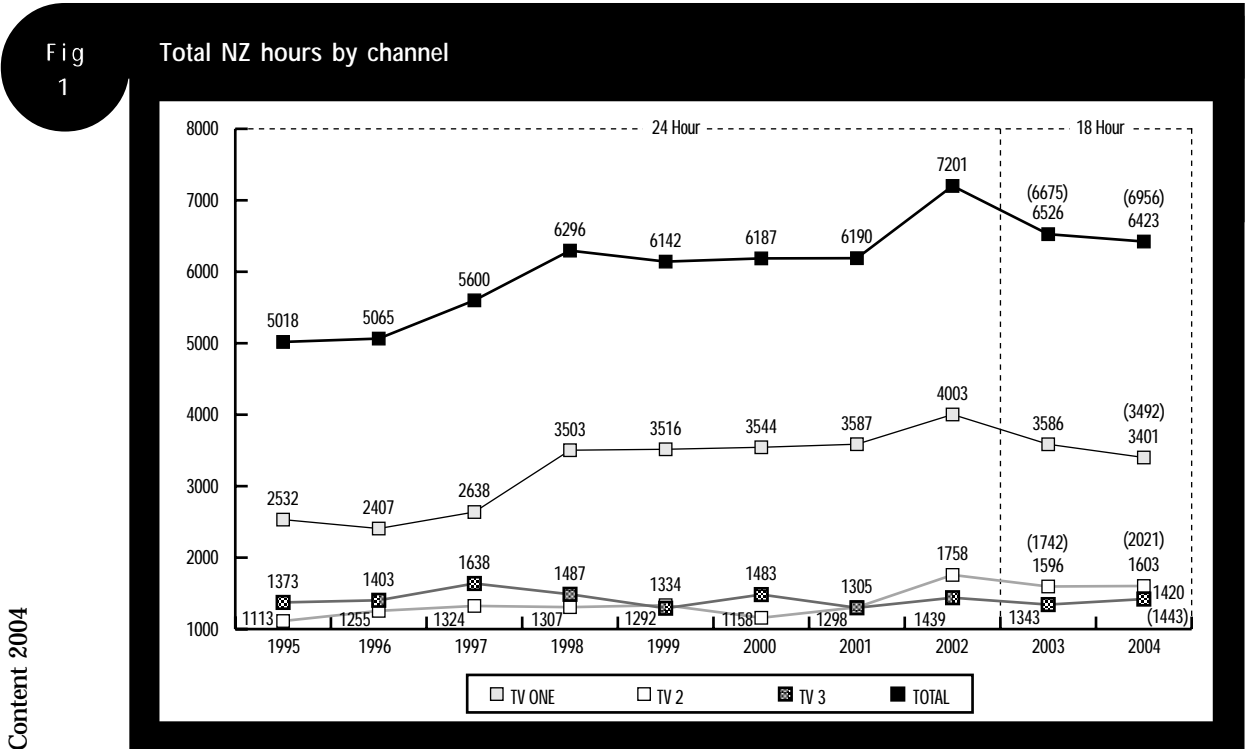
Total hours dropped from 6526 in 2003 to 6423 in 2004. Not a significant drop, this result meant that local content comprised 32.6% of the 6am to midnight schedule (33.1% in 2003) and 42% of the prime-time schedule (42% in 2003). There were increases on both TV2 and TV3, and a reduction in hours on TV One, with the most notable variances in total hours by genre being in Information and Children's programming. It should be noted that, due to time zones, much of the coverage of the Athens Olympics on TV One occurred after midnight and thus is not captured in these hours (TV One screened an additional 80 hours of sport between midnight and 6am in 2004). Also, a point of note is that by the 24-hour clock total hours increased by 430 hours to 6956 due to a significant increase in local programming after midnight on TV2.

### TV One

- Total local content hours declined by 185 to reach 3401 hours.
- Local content comprised 51.6% of the 6am - midnight schedule (54.6% in 2003).
- Continued to screen more than double the local content hours of both TV2 and TV3.
- Greatest decreases in local content hours were in the Information and Sports genres.
- Hours increased in Documentary, News and Current Affairs and Maori Programming.

### TV2

- Total local content hours increased marginally to 1603 hours (up 7)
- Local content comprised 24.3% of the 6am - midnight schedule (24.3% in 2003).
- There was a decline in Children's, Information and Sports hours.
- Hours increased in Entertainment, Drama/Comedy, Documentary, News and Current Affairs programming.



Local Content 2004

### TV3

- Total local content hours increased to reach 1420 hours (up 77)
- Local content comprised 21.6% of the 6am - midnight schedule (20.4% in 2003).
- There was a significant increase in Sports hours
- All other genres showed a decline in hours.

### NZ On Air's contribution

- NZ On Air contributed funding to 23.3% of the total New Zealand hours in 2004, a result consistent with 2003:

Figure 2 sets out total hours of New Zealand programming by genre from 1994 to 2004 (comprising first-run and repeats across all three channels). Comments on specific genre variations between years are made in section 8.

Fig  
2

Total NZ Hours By Genre 1995 - 2004

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	
Drama/Comedy	357	357	336	406	364	386	363	447	372	401	
Children's drama	28	12	0	13	9	6	14.5	0	24	24	
Children's	745	783	806	600	620	591	488	583	664	524	
Documentaries	257	252	269	334	331	242	260	349	355	414	
Information	415	867	1147	1485	1191	1041	1272	1322	1232	1076	
Entertainment	454	302	482	453	496	433	532	703	532	578	
Maori	173	218	256	255	287	371	396	387	363	356	
News/Current Affairs	1045	1198	1440	1751	1835	1876	2073	2111	2058	2160	
Sports	1545	1077	865	999	1010	1239	791	1299	926	889	
Total NZ Content	5018	5066	5601	6296	6143	6185	6190	7201	6526	6423	
% of Schedule	19.7%	19.2%	21.3%	24%	23.4%	23.5%	23.6%	27.4%	33%	32.6%	
Total Prime Time	1546	1586	1636	1647	1686	1602	1629	1732	1841	1860	
% of Schedule	35.4%	36.3%	37.5%	37.6%	38.5%	36.5%	37.2%	39.5%	42%	42.3%	
	24 hour clock							18 hour clock			

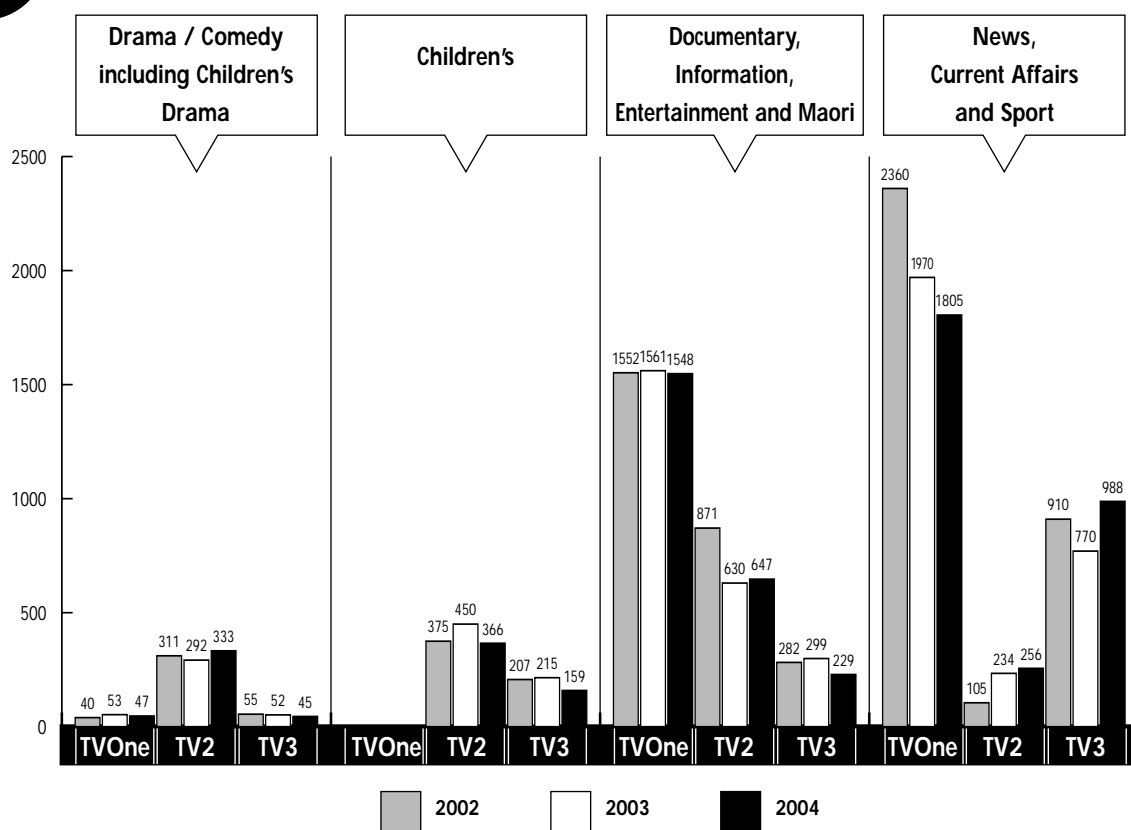
- Notes:
1. These hours are for TVOne, TV2 and TV3 only
  2. Figures have been rounded
  3. Prime time hours for all three channels are calculated as 4380 in total

The Local Content Group has decided to measure progress against four genre groups. These are:

- Drama/Comedy (including Children's Drama)
- Children's
- Documentary, Information and Entertainment and Maori
- News, Current Affairs and Sports

Results by these groupings for the hours 6am to midnight are as shown in fig 3.

**Fig 3** Local Content Group Genre Groupings (Total Hours)



# 5

## First-run Hours

First-run hours include both prime time (peak) and off-peak programming. First-run hours are an important local content indicator because their levels directly reflect the amount of new investment (both increasing and decreasing) in local programmes.

Total first-run hours increased by 60 hours on 2003 to reach 5231 hours.

Changes to note in 2004 include:

- Drama/Comedy hours dropped by 42 hours, largely due to a significant reduction in local Drama production.
- Children's Drama maintained its presence with 13 hours of first-run programming.
- First-run Children's hours declined by 102 hours, spread evenly across both TV2 and TV3.
- Documentary hours increased by 37, to reach 227 hours in 2004. This was driven by an increase in first-run hours for this genre on both TV One and TV2.
- Information hours declined by 54 hours spread across all three channels but with the greatest decline on TV One.
- There was growth in entertainment hours with a total increase of 51 hours to reach 470 hours. This is largely attributable to the addition of *Headliners* to the TV One schedule.
- The hours of first-run Maori programmes increased by 6 to reach 237, attributable to an increase in Maori programming on TV3.
- After declining in 2003 total first-run News coverage increased by 128 hours to reach 2073, the highest level ever recorded for this genre.
- NZ On Air's contribution to first-run hours decreased by 0.6% to 17.8% of the total.

Fig  
4

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

		Drama/ Comedy	Children's	Children's Drama	Doco.	Inform- ation	Entertain- ment	Maori	News, CA	Sport	Total
18 Hour	2004	175	296	13	227	866	470	237	2073	874	5231
	2003	217	398	13	190	920	419	231	1945	838	5171
24 Hour	2002	247	314	0	164	963	604	287	2013	1157	5748
	2001	205	308	7	197	990	391	295	1992	766	5151
	2000	181	308		168	892	313	256	1876	1188	5182

As a percentage of their 6am-midnight broadcast hours:

- TVOne screened 42.5% first-run local content (43% in 2003)
- TV2 screened 17.9% first-run local content (18.4% in 2003)
- TV3 screened 18.9% first-run local content (17.3% in 2003)

Excluding News and Current Affairs:

- TVOne screened 21.1% first-run local content
- TV2 screened 16% first-run local content
- TV3 screened 10.7% first-run local content

Genre first-run hours per channel are set out in Fig 5. below.

Fig  
5

First Run Hours (Peak And Offpeak) By Channel

	TV ONE	Drama/Comedy	Children's Drama	Children's	Doco.	Information	Entertainment	Maori	News, CA	Sport	Total
18	2004	22	0	0	147	618	147	154	1409	308 (376)	2805
	2003	34	0	0	116	649	76	154	1344	459	2832
24	2002	35	0	0	87	685	54	190	1439	750	3240
	2001	21	0	0	103	832	70	182	1142	423	3071
	2000	5	0	0	91	793	77	163	1347	759	3235
	1999	25	0	0	121	670	74	144	1324	758	3116
	1998	14		0	132	676	65	140	1328	751	3106
	1997	24		8	108	438	60	146	1002	562	2349
	1996	20		1	121	249	46	122	757	748	2064
	<b>TV2</b>										
18	2004	149	9	213	56	173	294	42	124	122	1182
	2003	157	7	263	45	185	291	44	65 (66)	152 (156)	1206
24	2002	153		250	33	189	506	47	19	69	1267
	2001	157	1	294	56	61	291	47	8	21	934
	2000	167		271	37	43	205	47	11	20	801
	1999	145		255	48	30	290	48	4	71	889
	1998	144	13	210	28	25	182	40	0	36	665
	1997	119		198	20	281	125	34	18	121	916
	1996	136		209	9	378	75	44	0	102	953
	<b>TV 3</b>										
18	2004	4	4	83	24	75	29	41	540	444	1244
	2003	26	7	136	30	87	52	34	536	227	1135
24	2002	59		64	45	89	45	59	556	338	1242
	2001	28	7	14	38	98	30	67	542	322	1145
	2000	10		37	40	57	31	47	518	409	1149
	1999	10		43	61	43	55	3	507	103	825
	1998	23		132	73	28	67	0	421	158	902
	1997	28		162	60	52	45	0	418	181	946
	1996	44		193	57	89	33	0	429	205	1050

Where a significant difference occurs between 18 hour and 24 hour figures, the 24 hour figure is included in parentheses ( ) beside the 18 hour figure.

**TVOne**

- First-run local content was 2805 hours with a decline overall of 27 hours.
- First-run entertainment hours increased by 71, largely due to the introduction of *Headliners*.
- There was a 31 hour increase in first-run documentary hours, reaching 147 hours, the highest level for this genre ever recorded.
- First-run sports coverage declined by 151 hours.

**TV2**

- First-run local content continued to decline with an overall decrease of 24 hours to reach 1182 hours.
- First-run children's hours declined by 50 to reach 213, the lowest level in 5 years.
- First-run documentary hours increased by 11 to reach 56 hours
- First-run sports coverage declined by 30 hours.
- Again, TV2 stayed well ahead of the other two channels in drama/comedy, attributable to the long-running soap *Shortland Street*.
- Maori programming remained static
- Children's drama hours increased by 2 hours to a total of 9.

**TV3**

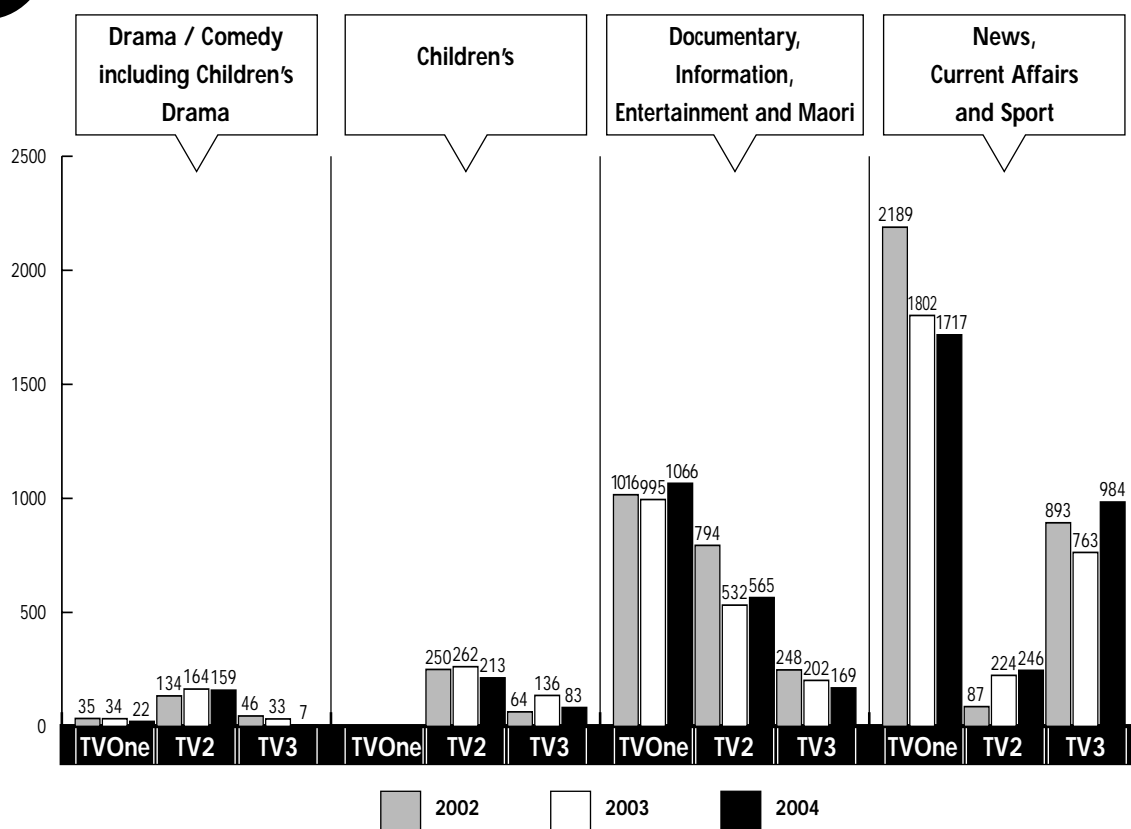
- First-run local content increased by 109 hours overall on TV3 in 2004 to reach 1244 - the highest level ever for this channel. This was due to a significant increase in sports coverage.
- There was a decline of 53 hours in first-run children's programmes.
- First-run sports hours increased by 217 to reach 444.
- First-run drama/comedy declined by 22 hours.
- Documentary declined by 6 hours.
- First-run entertainment hours declined by 23 to reach 29 hours.
- Children's drama hours declined by 3 hours to a total of 4.
- Maori programming showed a slight increase of 7 hours.

The Local Content Group has decided to measure progress against four genre groups. These are:

- Drama/Comedy (including Children's Drama)
- Children's
- Documentary, Information, Entertainment, Maori
- News, Current Affairs and Sports

First run results by these groupings, for the hours 6am to midnight, are as follows.

**Fig 6** Local Content Group Genre Groupings (First Run)



## Prime Time Hours

As prime time (6pm-10pm) attracts the biggest audience, and consequently has the biggest revenue potential, it is logical that the bulk of a network's production budget will be spent on programming in this time band. Therefore prime time local content hours are a useful indicator of the status of production spending by the television networks.

Prime time local content increased marginally by 19 hours in 2004 (from 1841 to 1860) and, for the second year running, this is the highest measure ever recorded for this survey. Local content accounted for 42.3% of the prime time schedule (42% in 2003).

TV One showed an overall decline of 19 hours with decreased hours across most genre groupings with the exception of news, current affairs and sports. The reverse was true for TV2 with a total increase of 73 hours and increases across all genre groupings with the exception of news, current affairs and sport. TV3 showed an overall decline of 35 hours in prime time local content.

The proportion of prime time hours supported by NZ On Air in 2004 declined by 1.5% with NZ On Air contributing to 11.7% of local content, compared with 13.2% in 2003.

As a percentage of their primetime schedules (calculated as 1464 hours per channel as 2004 was a leap year):

- TV One screened 58.8% local content (60.3% in 2003)
- TV2 screened 29.6% local content (24.7% in 2003)
- TV3 screened 38.6% local content (41.1% in 2003)

When News and Current Affairs are excluded:

- TV One screened 22.4% local content (23.8% in 2003)
- TV2 screened 28.2% local content (21.8% in 2003)
- TV3 screened 10.4% local content (13.2% in 2003)

Detail on each channel follows:

### TV One

- Once again TV One screened the most prime time local content of all channels with 861 hours but showed an overall decrease of 19 hours on 2003.
- Prime time documentary hours increased by 27% to reach 135 hours
- Entertainment hours in prime time decreased by 28 hours to a total of 36 hours, despite the big increase across the full schedule (attributable to the addition of *Headliners*).
- There were decreases across information, drama/comedy and sports in prime time.
- News and current affairs hours in prime time were consistent with 2003 at a total of 533 hours.

### TV2

- Local content in prime time increased by 73 hours.
- There were increases across information (4 hours), documentaries (13 hours), entertainment (64 hours), drama/comedy (7 hours) and sports (9 hours).
- News and current affairs decreased by 22 hours to a total of 20 hours.

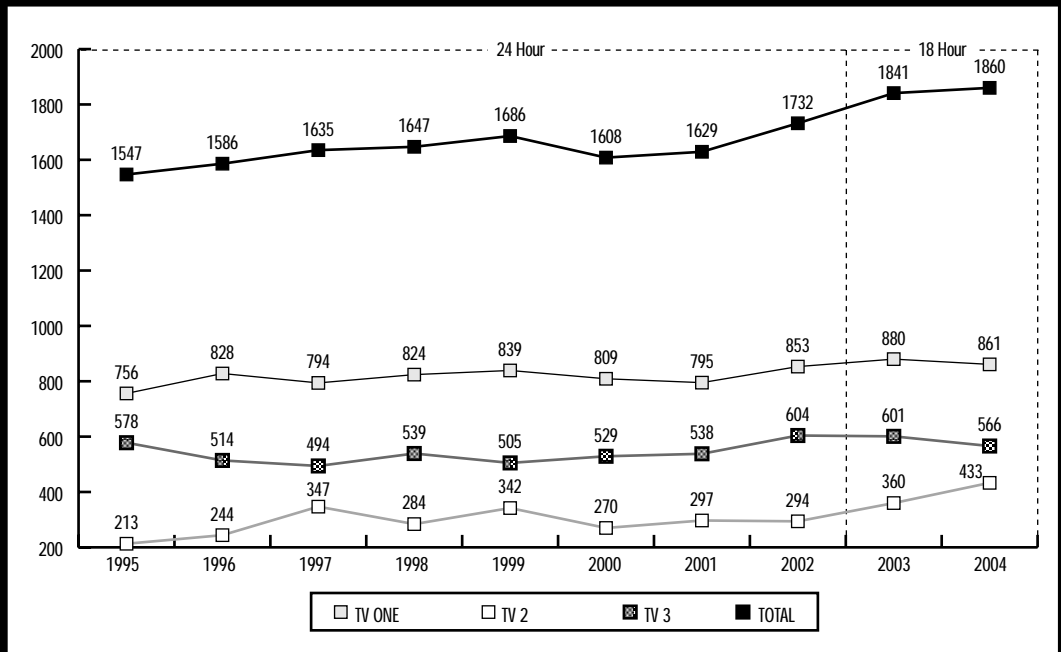


### TV3

- Prime time local content decreased by 35 hours
- Prime time sports coverage remained static
- News and current affairs prime time hours increased by 5 to a total of 413 hours.
- All other genres showed a decrease in primetime hours.

Fig  
7

Prime time hours by channel

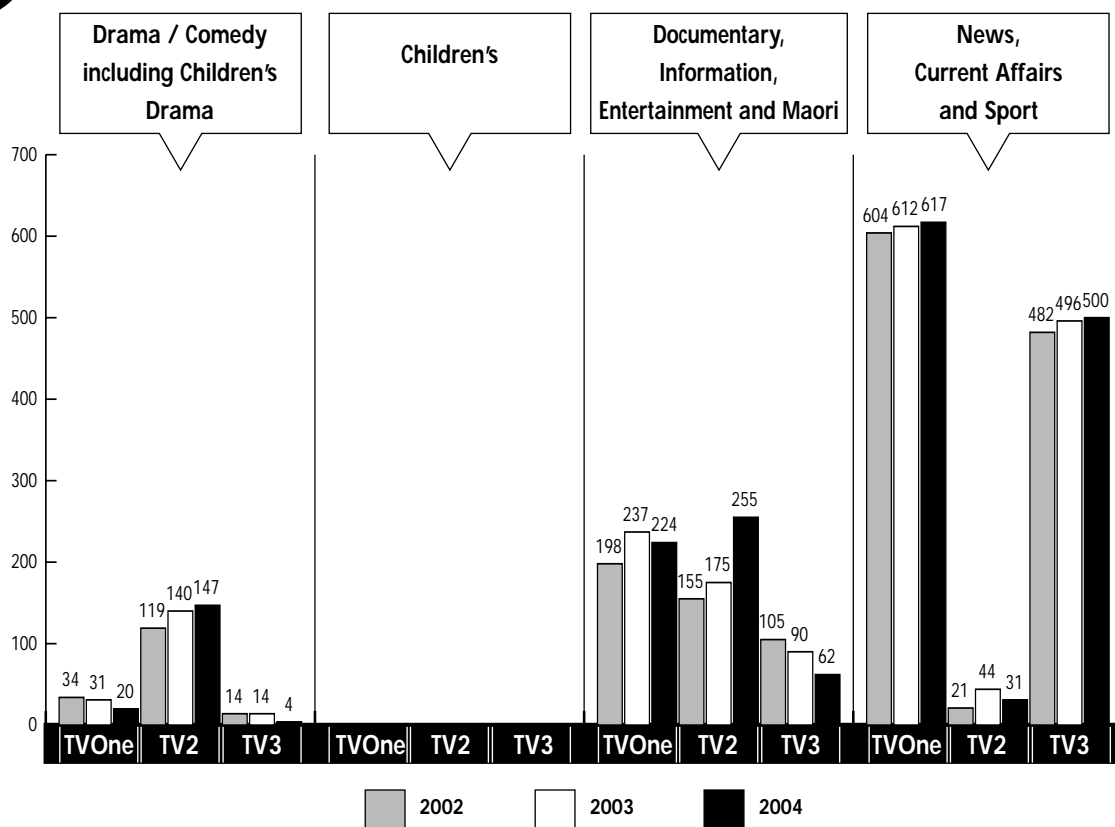


The Local Content Group has decided to measure progress against four genre groups. These are:

- Drama/Comedy (including Children's Drama)
- Children's
- Documentary, Information, Entertainment, Maori
- News, Current Affairs and Sports.

Prime time results for these genre groupings are as follows.

**Fig 8** Local Content Group Genre Groupings (Prime Time)



# 7

## Repeat Hours

Repeated programmes generally don't feature in the prime time schedule (although levels are higher over the summer holidays). Repeat programmes are screened by channels partly as a result of the demands of 24-hour transmission (ie. the need to screen low-cost programming in uncommercial slots such as overnight or very early morning) and partly to ensure the efficient utilisation of commissioned programmes by the channels (i.e. repeat screenings are mostly utilised at no cost).

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

In line with the other segments of this report repeat hours are now measured in terms of the 18-hour period from 6am - midnight. This is the most-watched period of the TV schedule.

The total number of repeats in 2004 declined by 12% or 162 hours to reach 1192. As a proportion of total hours, repeat programmes dropped to 19% compared with 20% for 2003.

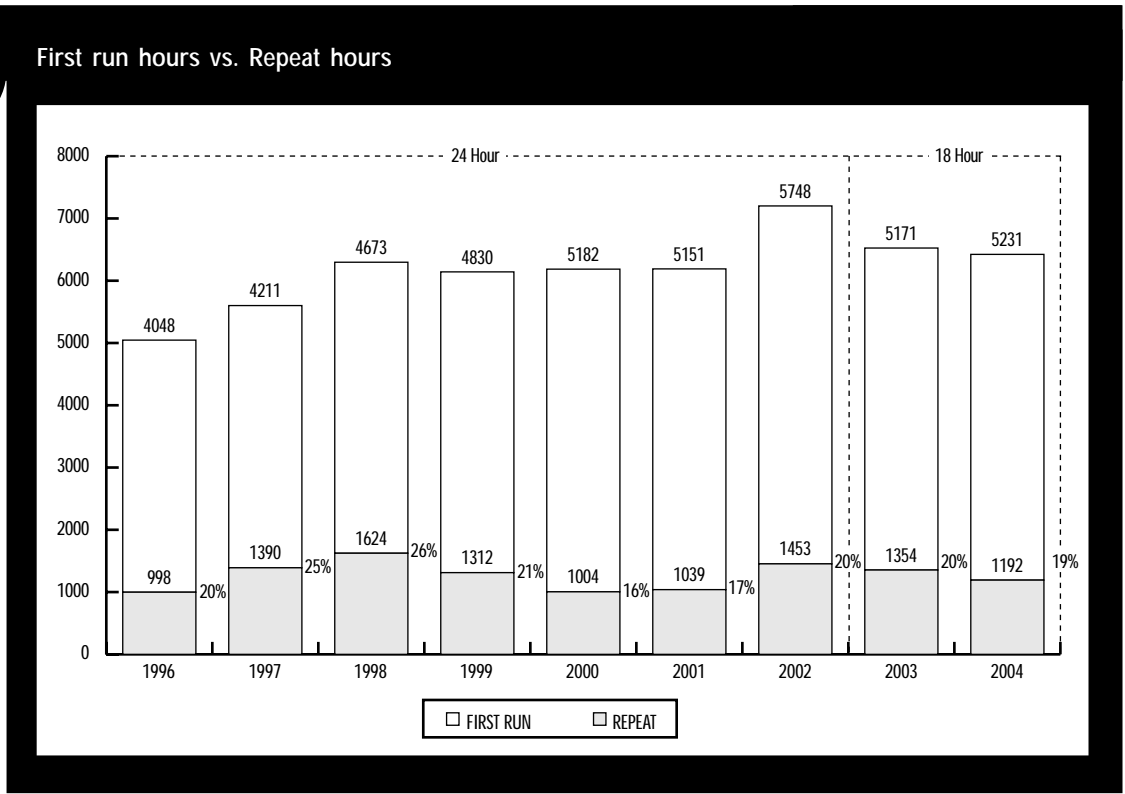
Repeats of information programming declined on TV One, consistent with the decline across the full schedule. Repeated news, current affairs, sport and entertainment also declined on TV One. All other genres showed an increase in repeat hours.

Documentary, Maori, Entertainment and Children's Drama programming showed increases in repeat hours on TV2 with Drama/Comedy also showing an increase of 42 repeat hours. All other genres showed a slight decline in hours.

Repeat hours on TV3 remained relatively static with the exception of Maori programmes, which showed a decline of 26 hours, and drama/comedy, which increased by 22 hours.

Fig 9

First run hours vs. Repeat hours



A brief comment on the 2004 trends by individual genre follows. Statistics for each of the nine genres by channel are summarised in Appendix 2.

### INFORMATION PROGRAMMING

The total information hours, across all networks, decreased by 156 hours in 2004 - falling from 1232 to 1076.

The greatest decrease occurred on TV One with a drop in information programming of 119 hours. TV One screened 75% of the total information programming screened in 2004. Most of the TV One decrease in 2004 was in repeat programming (down 89 hours), with the balance shared equally across prime time and off-peak.

A number of new information programmes debuted on TV One in 2004, including *Ground Rules*, *Taste Takes Off* and *Frontseat*. Special interest programmes *Tagata Pasifika*, *Asia Down Under* and *Praise Be* all contributed to TV One's information programming in 2004, as did perennials like *Fair Go*, *Home Front* and *Good Morning*.

Information programming hours also decreased on both TV2 and TV3 but to a much lesser extent.

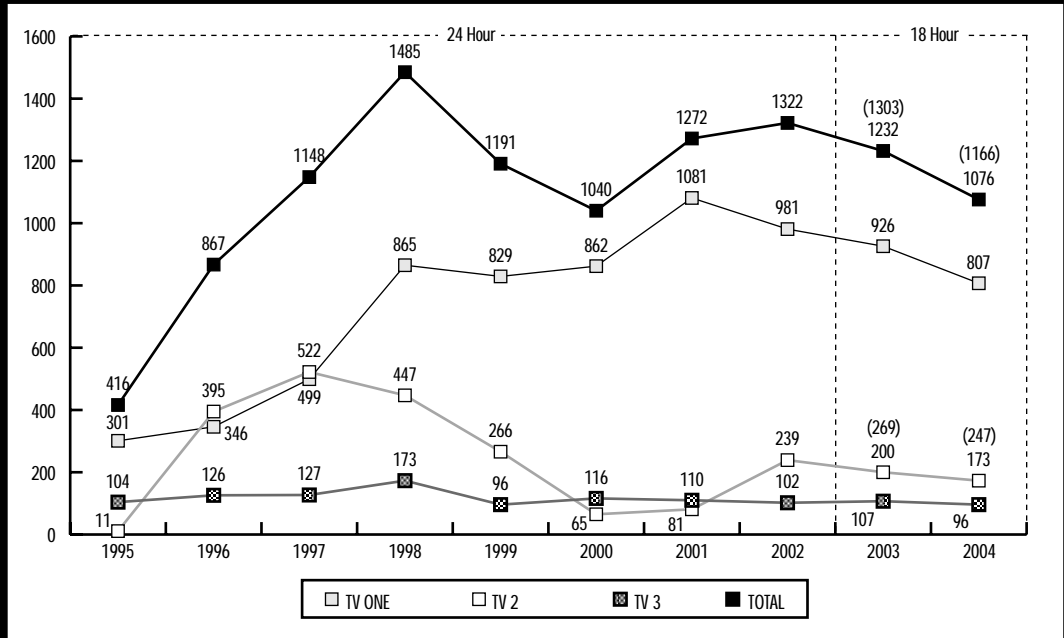
On TV2, information programming decreased by 27 hours, attributable to repeat and off-peak hours. Prime time information hours were up by 4 to reach a total of 37 hours. New programmes in prime time on TV2 included *Mitre 10 Mega: The Fence* and *My House My Castle*. *Quest for Success* and *Queer Nation* were just some of the information series that returned to TV2.

TV3's information programming declined by 11 hours to 96 hours in 2004. Small increases in both the repeat and off-peak hours were offset by a decline in prime time information programme hours, which decreased by 13 hours. *Garden Wars* debuted on TV3 in 2004 and *Hot Property*, *Target*, *Open Door* and *The Living Room* all featured as part of TV3's information programming line-up.

NZ On Air funded some shows in the information category, notably special interest programming, for example, *Tagata Pasifika*, *Asia Down Under* and *Praise Be* on TV One, *Queer Nation* on TV2, and *Open Door* and *The Living Room* on TV3.

Fig  
10

Total NZ information programmes by channel



Where a significant difference occurs between 18 hour and 24 hour figures, the 24 hour figure is included in parentheses ( ) above the 18 hour figure.

## DOCUMENTARIES

Total documentary hours increased by 59 in 2004, to reach 414 hours with increases on both TV One and TV2 and a decline on TV3.

On TV One total documentary hours increased by 49, mainly due to a 28-hour increase in first-run primetime documentary hours and a 17-hour increase in repeat hours.

There were a number of new programmes in this genre including; the *NZ Festival* documentary series, *Explorers*, *Animal House*, *Coastwatch*, *Road to Athens* and *Courtroom*. Programmes returning for another series included; *Going, Going, Gone*, *Intrepid Journeys*, *Country Calendar* and *Location, Location, Location*.

Total documentary hours on TV2 increased by 21 with first-run hours up 11 and repeats up by 10 hours. *City Girls*, *The Lion Man* and *Nurses* all made their debut in 2004 with *Motorway Patrol*, *Serious Crash Unit* and *Police Ten 7* all returning for a new series.

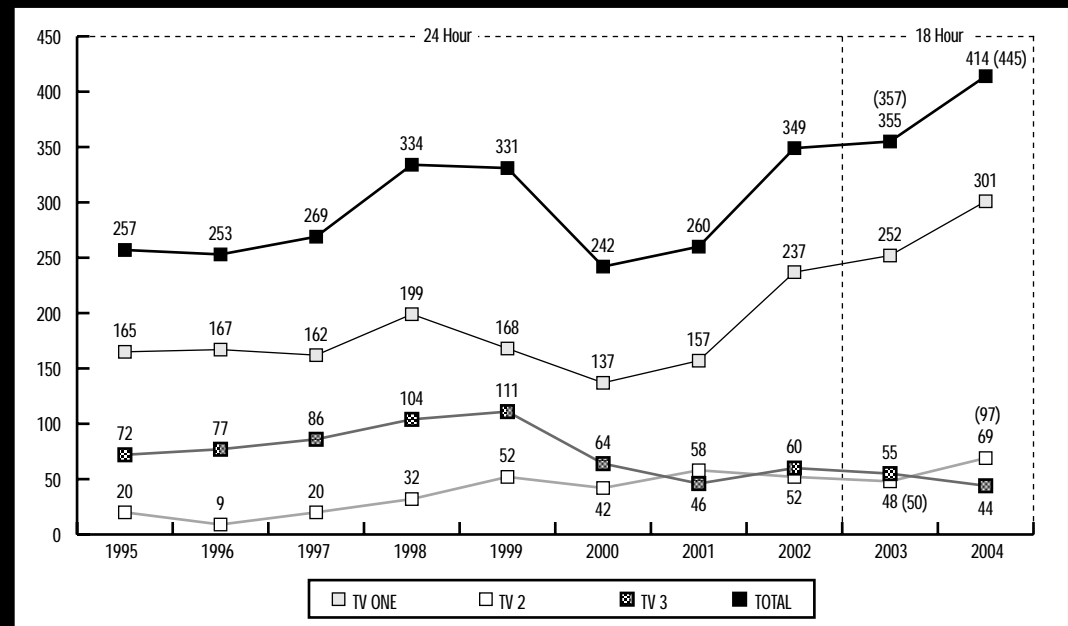
TV3's total documentary hours decreased by 11 hours with repeats decreasing by 5 hours and prime time documentary programming decreasing by 6 hours.

*John Campbell With A Queen's Tour* made its first appearance on TV3 in 2004 while *Inside New Zealand* returned for a 13th series.

NZ On Air is a substantial supporter of the documentary genre and provided \$9.38 million in the 2003-2004 year, contributing to 133 hours of documentary programming.

Fig  
11

Total NZ documentaries by channel



Where a significant difference occurs between 18 hour and 24 hour figures, the 24 hour figure is included in parentheses ( ) beside the 18 hour figure.

## MAORI PROGRAMMING

The total hours of programming made predominantly by Maori for Maori (whether in Te Reo or English) was 356 hours, a slight decrease of 7 hours on 2003. This excludes programming screened on the Maori Television Service, which is covered in the 'Other Channels' section of this report.

TV One registered 259 total hours, an increase of 10 hours. This was solely due to an increase in the hours of repeat programming. *He Whare Korero* made its debut in this genre in 2004 with *Waka Huia*, *Marae* and *Te Karere* all returning. *Te Karere* was also repeated.

The total hours of Maori programming on TV2 increased by 2 to 48 hours with no new programmes debuting in this genre. *Haka Time*, *Mai Time*, *He Wai* and *Korero Time* all returned.

Despite an increase in first-run hours in this genre TV3's total hours declined by 19 to 49 hours. This was due to a decrease in repeat hours. First-run hours increased by 7 hours to 41.

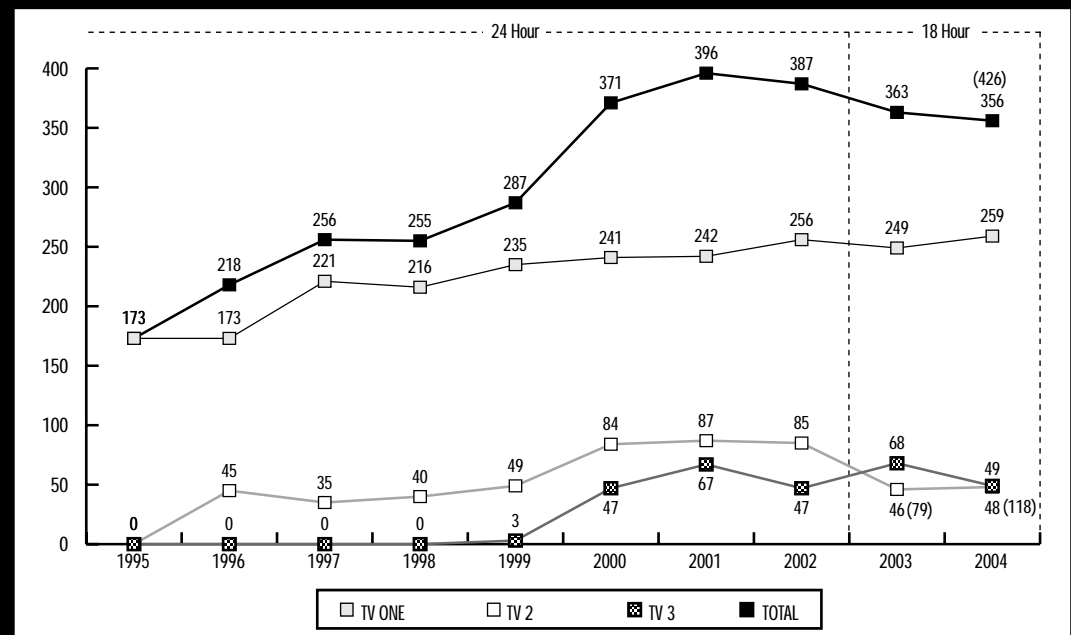
No programmes made their debut on TV3 in this genre in 2004 but *Pukana*, and *Nga Paki Waituhi* both returned.

Te Mangai Paho funds the majority of Maori programming. All listed programmes screened off-peak. NZ On Air funded both *Haka Time* and *Mai Time*, two Maori programmes of interest to a mainstream audience, which includes Maori.

In addition to programmes included in this category, some documentaries with significant Maori content screen within TV3's *Inside New Zealand* and TV One's *Documentary New Zealand* strands. These are not included in this tally, but appear in the documentary genre figures.

Fig  
1 2

Total Maori programmes by channel



Where a significant difference occurs between 18 hour and 24 hour figures, the 24 hour figure is included in parentheses ( ) beside the 18 hour figure.

## CHILDREN'S PROGRAMMES (including Children's Drama)

Total hours of children's programmes showed a decline of 115 hours reaching a total of 549 hours in 2004. This was due to decreases across both TV2 and TV3.

NZ On Air is the main funding contributor to children's and young persons' programming and a new children's strategy in the 2003-2004 year resulted in the funding of more stand-alone (but lower volume) children's shows. Increased costs also had an impact. NZ On Air provided \$11.2 million of funding towards the production of around 383 first-run hours in the 2003-2004 funding year. This compares with just over \$11 million for around 436 first-run hours the year before. A total of \$4.8 million was also committed to the funding of 25 first-run hours of children's drama. The necessity for off-peak timeslots means that broadcasters will not commission this genre without substantial financial assistance.

No children's programmes screened on TV One with the exception of *Tiki Tiki*, which, for the purposes of this survey, is counted as a Maori programme.

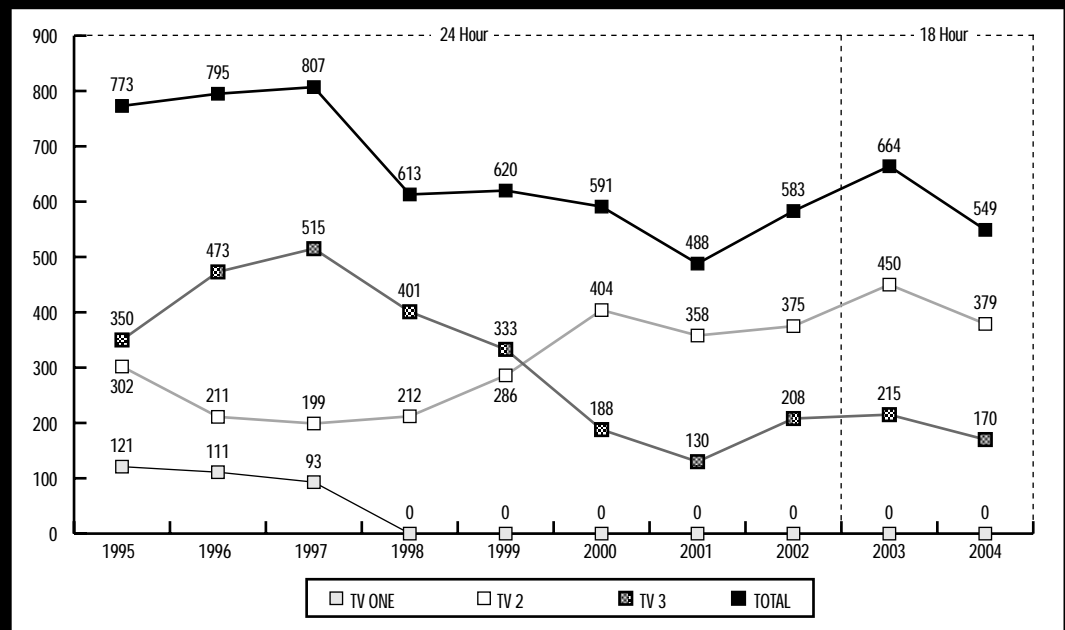
Again, TV2 was the main provider of children's programmes with a total of 379 hours, a decrease of 71 hours compared to 2003. First-run hours decreased by 41 to 222 hours in 2004 and children's repeats also decreased by 30 hours. This is largely attributable to a reduction in hours of *What Now?* in 2004. Children's programmes to debut on TV2 in 2004 were *Studio 2* as well as drama series *P.E.T Detectives*. Making a welcome return to the TV2 schedule were *Saturday Disney* and *Squirt*, with *Party Animals* also returning for a second series.

TV3's total hours of children's programming decreased by 45 hours in 2004, to reach 170 hours. This decrease was predominantly in first-run programming and was mostly due to a reduction in the hours of *Sticky TV*.

The year saw a new series of children's drama *Secret Agent Men* and *The Dress Up Box* and *Wannabes* returned to the TV3 schedule.

Fig  
13

Total NZ children's hours by channel





## ENTERTAINMENT

Total entertainment hours increased by 45 hours in 2004 to 578 hours. This was mainly due to an increase in prime time hours on TV2 and off-peak hours on TV One but offset by decreases in other areas.

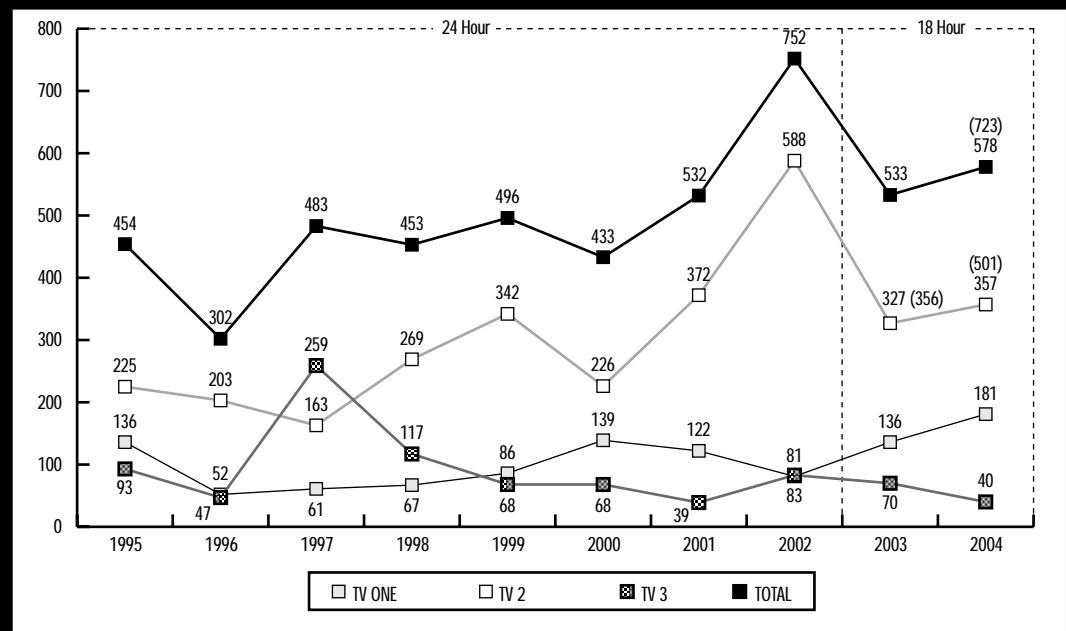
Entertainment programming on TV One reached a total of 181 hours with a decrease of 28 hours in prime time, largely due to the loss of *Big Night In* and *Edwards At Large*. Repeat hours were also down but off-peak hours increased by 98 hours, attributable to the introduction of *Headliners* to the TV One schedule. *Action Replay* also made its debut on TV One and *Game of 2 Halves*, *Hum* and *Mucking In* all returned.

TV2 showed a healthy increase of 64 hours in prime time entertainment programming with the introduction of *NZ Idol*, *Top of the Pops* and the 24-hour musicathon *National Anthem*. *Living the Dream*, *Captive* and *City Celebrity Country Nobody* also debuted on the channel. Programmes making a return included; *Celebrity Treasure Island*, *Sports Café* and *Guess Who's Coming To Dinner?*. Repeat screenings were up by 27 hours and off-peak programming down 61 hours, attributable mainly to the loss of *Space* from the TV2 schedule.

TV3's hours of first-run entertainment programming showed a total decrease of 22 hours with the greatest decline (14 hours) in off-peak programming. *The Great Kiwi Drivers' Challenge*, *Havoc Presents Quality Time* and *The World of Wearable Arts* all made their debut in this genre. *X-Air* and *Christmas In The Park* returned to the schedule and *Ground Force* and *Home Truths* were repeated.

Fig  
14

Total NZ entertainment hours by channel



NB: The 2002 numbers shown in this graph are higher due to a categorisation error in the 2002 survey.

Where a significant difference occurs between 18 hour and 24 hour figures, the 24 hour figure is included in parentheses ( ) beside the 18 hour figure.

## NEWS AND CURRENT AFFAIRS

As highlighted in last year's Local Content Report an allowance for newsbreaks is no longer made in this report. They make up a very small percentage of the total hours and arguably are neither first-run nor repeat programming.

In 2004 total hours of News and Current Affairs increased by 101 hours to reach 2160 hours. The major contributor to this growth was an increase in off-peak hours on both TV One and TV2, of 66 hours and 81 hours respectively. This was offset primarily by a decrease in TV2's prime time hours and a decrease in repeat hours on both TV One and TV3.

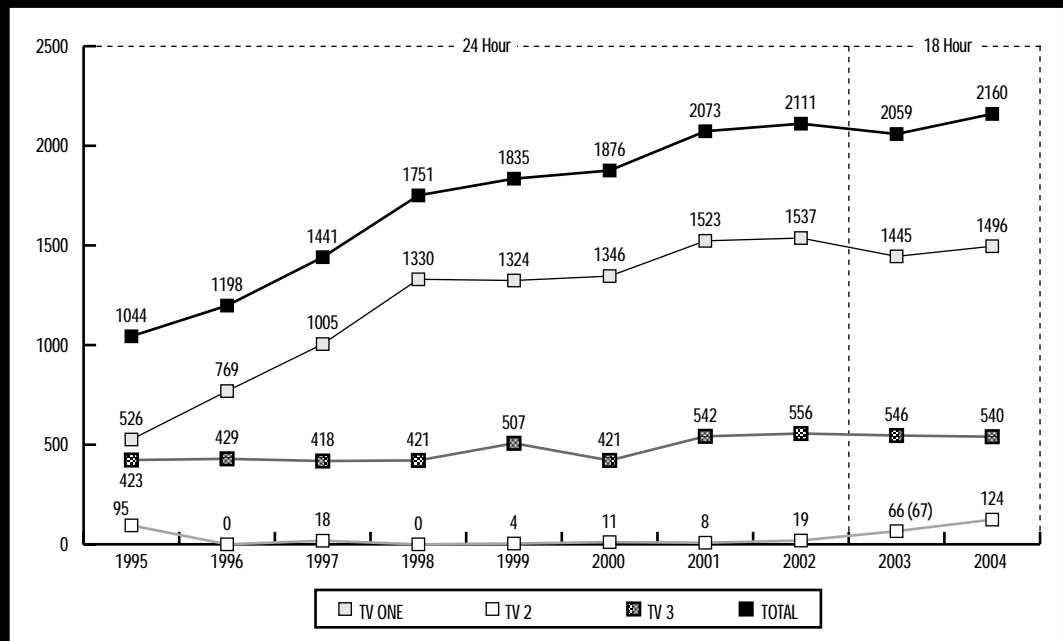
TV One added a number of new programmes to its news complement in 2004 including; *Tonight, Agenda, Eye To Eye* and *One News: Insight*. Late in the year *Close Up at 7* also debuted replacing *Holmes*. The channel's staples continued to be the early morning *Business* and *Breakfast* shows as well as *Midday* and *One News. Face To Face, Foreign Correspondent* and *Sunday* also returned to TV One in 2004.

TV2's total news and current affairs hours increased by 58 in 2004 - rising to a total of 124 hours. This was all first-run programming, comprising 20 prime time hours and 104 off-peak hours - all due to the youth news show *Flipside*.

TV3's total news and current affairs hours reduced marginally from 546 in 2003 to 540 hours in 2004. An increase of 5 prime time hours was offset by a decrease in repeat hours.

Fig  
15

Total NZ news & current affairs hours by channel



## SPORTS

Total sports coverage can fluctuate dramatically; largely affected by major international events such as the Olympic Games (1992, 1996, 2000 and 2004), Commonwealth Games (1990, 1994, 1998 and 2002) or the America's Cup.

The 2002 local content figures were boosted by coverage of three major sporting events: The Commonwealth Games, Winter Olympics and the Louis Vuitton Cup. The following year levels were increased by coverage of the America's Cup and the Rugby World Cup, but to nowhere near the number of sports hours of the events broadcast in 2002. In this survey, due to time zones, much of the coverage of the Athens Olympics on TV One occurred after midnight and thus is not captured in these hours. TV One screened an additional 80 hours of sport between midnight and 6am in 2004. TV2 and TV3 also ran a combined total of 41 hours of sport between midnight and 6am.

In 2004 overall total sports hours decreased by 37 hours. A decline in hours on TV One and TV2 was largely offset by an increase in hours on TV3.

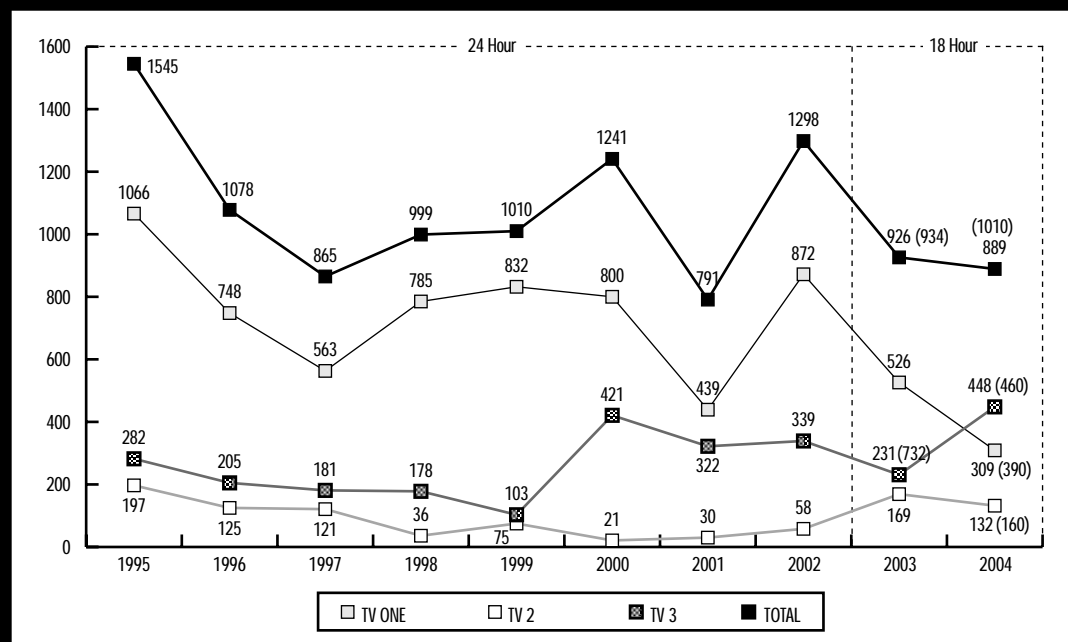
Due to the variances caused by major event coverage TV One's total sports hours declined by 217 hours to reach a total of 309 hours. Sports coverage included: Olympics, Netball, Rugby Sevens, Swimming, Rowing and Motor Sport. Also featuring as part of TV One's sports line-up were *The Halberg Awards* and *Paralympics*.

Sports coverage on TV2 was also down, declining by 37 hours. Sports coverage on TV2 included: Tennis, Basketball, Beach Volleyball, Softball and Surf League. Extreme sports coverage continued with *XS-TV*.

In contrast total sports hours on TV3 showed an increase of 217 hours to reach a total of 448 hours - the highest level on this channel since 1994. This can be attributed to increased Cricket coverage and Tri-Nations, NPC and Super 12 Rugby. *Sportzah* and *Sports Tonight* also featured in TV3's sports line-up.

Fig  
16

Total NZ sports hours by channel



Where a significant difference occurs between 18 hour and 24 hour figures, the 24 hour figure is included in parentheses ( ) beside the 18 hour figure.

## DRAMA/COMEDY HOURS

Total hours in this genre increased by 23 in 2004, to 401 hours, with a decrease on TV One offset by an increase in hours on TV2.

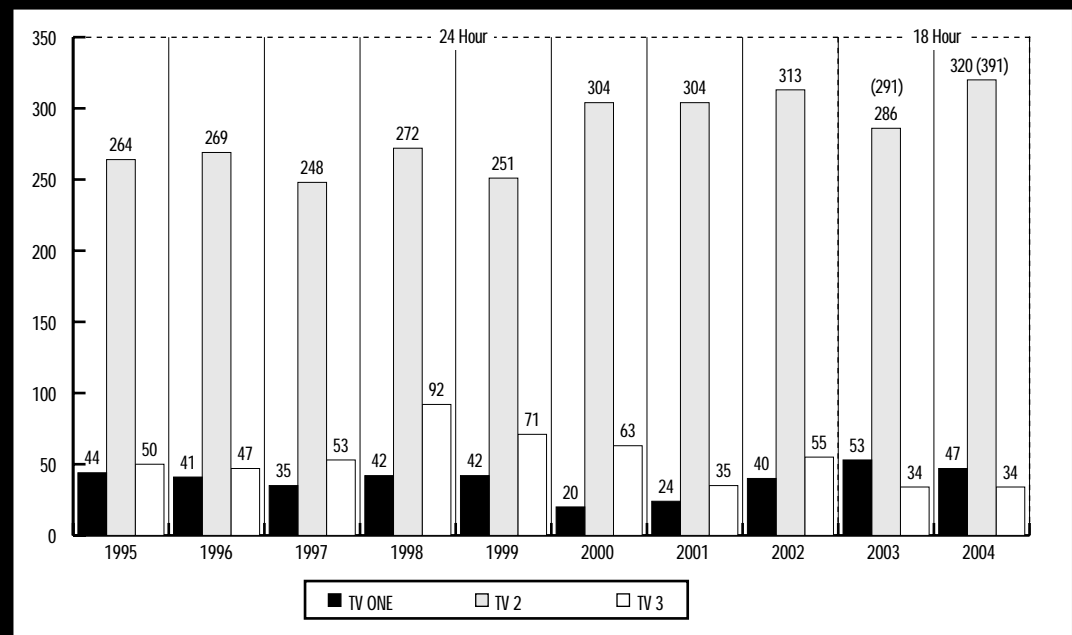
TV One's total hours of drama and comedy programming were down by 5 to reach a total of 47. There was however a greater decrease in prime time hours with a decline of 11 hours. *Whale Rider* had its television premiere on TV One in 2004 and *Mercy Peak* concluded its run. *Greenstone* was also repeated. *Serial Killers* and *Facelift* were new comedies to screen on TV One while *Willy Nilly* was repeated.

*Shortland Street* continues to be the mainstay of TV2's drama schedule and thus contributed to an overall increase of 35 hours on the channel. First run hours were down by 7 but *Insiders Guide To Happiness* was a welcome addition to the TV2 schedule. *Eating Media Lunch* and the *Comedy Gala* also made a return to TV2. Repeat screenings of *Jackson's Wharf* and *Street Legal* contributed to an increase of 42 repeat hours in this genre.

Drama and comedy hours on TV3 remained static at 34 with a decrease of 11 prime time hours being offset by an increase in repeat hours. No new drama debuted on TV3 but *Shortcuts* made a return and New Zealand features *Once Were Warriors*, *What Becomes of the Broken Hearted?* and *Crooked Earth* all had repeat screenings on TV3 in 2004. *bro' Town* also made an impressive entry into the world of television comedy.

Fig  
17

Total NZ drama/comedy hours by channel



NB: 2002 hours for TVOne and TV2 are lower than those shown in the 2002 survey due to a categorisation error.

This survey includes data on a sample of other channels including non-national and Pay-TV channels.

### PRIME TELEVISION & C4

Prime Television, which is now a national broadcaster, is included in this section because its levels of local content as yet remain too low to warrant inclusion into the main body of the report. Prime is now starting to commission more local content and became a member of the Local Content Group in June 2004.

Prime's local content hours reached a total of 25 hours in 2004, a decrease of 14 hours on the previous year. With the exception of a repeat screening of the Bright Williams documentary this consisted of Rugby League and Cricket coverage.

C4, CanWest's music channel, screened 830 hours of local content in 2004, 26% of its broadcast hours.

### MAORI TELEVISION SERVICE

The Maori Television Service launched in March 2004, therefore the local content hours captured by this survey don't cover a full year. MTS broadcasts from 4.00pm until 11.30pm every day, with a screening of Maori language series *Manu Rere* from 10.00am until 11.00am on weekday mornings. MTS screened a total of 1374 hours of local content in 2004 comprising 62% of their total broadcast hours. A total of 973 hours was first run programming with 401 hours of repeat programming.

When broken down by genre the hours of local content were: Entertainment - 339 hours (25%), Information - 278 hours (20%), Maori Programmes - 231 hours (17%), Children's - 184 hours (13%), News & Current Affairs - 164 hours (12%), Drama/Comedy - 78 hours (6%), Documentaries - 58 hours (4%) and Sports - 42 hours (3%).

### SKY TELEVISION

Figures for local content screened on Sky were collated by Sky. Their breakdown is included as appendix 9. 7610 hours of local sport and 233 hours of entertainment programmes were screened across Sky's channels.

## REGIONAL CHANNELS

Since this survey began there has been a burgeoning of smaller regional and community channels and channels now operate from the Far North to Invercargill.

The New Zealand Regional Television Broadcasting Group (RTB) represents the common interests of these stations. These stations may operate under commercial or non-commercial licences. The RTB maintains that the key point they have in common is that they are able to meet the viewing demands of that part of the population whose viewing requirements cannot be met on a national basis.

The RTB submits that its members screened 26,194 hours of 'locally produced' or 'locally provided' programmes, including repeat screenings. A 'locally provided' programme is one purchased from overseas by a local community group, with broadcast time then purchased from the local channel. A 'locally produced' programme is just as it sounds. 5964 hours of the total are first-run and 20,230 hours are repeats. The Chairman of the RTB reports that of the 5964 first-run hours claimed, 4497 are locally produced and 1177 are locally provided, with 289 hours being regional first-run NZ On Air programmes.

**Note:**

Filler programmes such as New Zealand music videos are not included, just as filler programmes are not included for the national channels.

## Notes On Methodology

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

9. The categories are:

#### **Drama/Comedy**

This category contains all New Zealand-made drama and comedy, other than drama made for children. Comedy is classified as drama, not entertainment when it is scripted and acted in accordance with usual drama production techniques (examples include *Serial Killers* and *Willy Nilly*).

#### **Sports**

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

#### **News and Current Affairs**

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

#### **Entertainment**

This category includes game shows, music programmes (from classical to rock), quizzes and competitions such as *NZ Idol*, broad competitive formats such as *Mitre 10 Dream Home*, *Celebrity Treasure Island* and *Ground Force* plus light entertainment shows.

#### **Children's**

Programmes which use New Zealand presenters to provide links between cartoons and other overseas material, such as TV2's *Studio 2*, or which have a minority of New Zealand content such as *Squirt*, are classified by the amount of New Zealand content only. Programmes which contain some overseas content but have a majority of New Zealand content, such as *What Now?*, are fully classified as New Zealand programmes.

#### **Children's Drama**

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

#### **Maori Programmes**

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

#### **Documentaries**

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

#### **Information**

This category comprises a wide range of programme types, generally with a magazine format and/or an information flavour, as opposed to an entertainment or competitive one. Examples include series such as *Frontseat*; religious series such as *Praise Be*; leisure and lifestyle series such as *Home Front*; and special interest series such as *Inside Out*.