

Local 2002

New Zealand Television

Content

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Chairman's Introduction

NZ On Air has conducted this Local Content Survey since 1990, when it covered the first two years of a three-channel market. The survey tracks the quantity of locally made television programmes being screened on national free-to-air channels each year, as a proportion of the whole television schedule. It tallies up programmes by genre, and measures such factors as how much of the local content was first-run, how much was repeat and how much was screened in prime time.

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

We have made changes over the years to keep it relevant, and each year NZ On Air conducts market research to add some qualitative analysis to this quantitative measure. In 2002, for example, we carried out qualitative research into audience perceptions of the various genres funded by NZ On Air.

The 2002 report records a very significant milestone. For years now the level of local content has hovered between 23% and 24%. This year's report records the biggest increase in this percentage since 1993. In 2002 the percentage of total broadcast hours that is made up of local content was 27.4%, an increase of 3.8% on 2001.

There are increases in almost all programme genres, but by far the major contributor to this increase was an increase in sports hours. The other major increase was in repeats, which totalled 414 hours more than in 2001. The decisions of TVNZ and TV3 to cancel infomercials were the main reason for this, as these were in part replaced by repeats of New Zealand programmes. TV One increased repeats of local shows by 248 hours and TV2 increased repeats by 121 hours.

While relatively low cost genres such as information, entertainment, news and current affairs programming continue to show the biggest increases over time, of particular interest in 2002 is a 42 hour (20%) increase in first-run drama and comedy. These genres are at the most expensive and risky end of the spectrum of commissioned programmes. It is therefore heartening to see that broadcasters are showing their willingness to make a sustained commitment to drama and comedy programmes, such as *Mercy Peak*, *Street Legal*, *The Strip*, *Spin Doctors* and *Willy Nilly*.

Other relatively high cost or special interest genres such as documentary and children's programming are also slowly increasing over time.

In recent years we have observed a decline in the proportion of local content which has been made with NZ On Air funding. This trend was reversed in 2002, with NZ On Air contributing to 19.8% of the total local content hours, up 2% on 2001. It is worth noting that this increase would have been more marked if the overall increase had not been mainly due to sports coverage, which NZ On Air does not fund, and to repeats. The best indicator of the link between NZ On Air funding and hours on screen is the contribution made by NZ On Air to first-run hours. In 2002 NZ On Air contributed towards 15% (861 hours) of first-run hours screened during the year, compared with 11% (544 hours) in 2001. In 2002

NZ On Air also contributed to 12.5% of prime time local content, compared with 11% in 2001. These improvements show that the Government's decision to allocate increased funding to NZ On Air in 2001 and in 2002 is having a significant impact.

Looking at the picture of increases across the other genres we can also see that broadcasters are contributing solidly to total local content, with more programmes produced without the need for public funding. The increase in broadcaster-funded hours once again underlines the fact that television networks are by no means reluctant to screen local programming. However, such programmes are generally more commercial, or lower cost, than NZ On Air funded genres.

Taken together, these facts show that the main factor limiting the level of local content is its cost. A market the size of New Zealand's struggles to compete with off-the-shelf programming that can be purchased from larger markets at a fraction of the cost of local programmes.

For the third time we have adjusted the total broadcast hours results to give local content figures for the period from 6am to midnight. This is done in order to make a direct comparison with Australian local content figures. Even without the adjustment, TV One is already exceeding the Australian transmission quota figure of 55%, by 2%. Under the 18 hour clock TV One's local content percentage increases to 60% of total transmission (from 6.00am to midnight) - up 5.5% on 2001.

The adjusted local content transmission figures for TV2 and TV3 are 25% and 22% respectively. These levels remain well below Australia's local content quota. It is important to recognise, however, that carrying a full news and sports service will always add significantly to a channel's local programming. The absence of both on TV2 is a factor in its local content levels.

In May 2000 NZ On Air estimated that additional funding of \$2.6 million dollars per channel would be needed to increase local content levels by one percentage point. This figure is based on a 24 hour clock and does not allow for broadcaster contributions. On this basis, additional funding of at least \$164 million would be required to ensure that all of the free-to-air national channels achieved local content levels comparable to Australia. Based on recent trends, we conclude that this level of additional funding is most unlikely to be achieved through advertising revenue in an economy the size of New Zealand. The other alternative, of allocating the additional amount through public funding, is also unlikely to be achievable in New Zealand. The answer therefore must be to agree on the level of local content that is desirable, sustainable and achievable for the New Zealand market, utilizing a combination of the public and private resources available. At the time of writing, a local content group, set up by the Minister of Broadcasting, is beginning to grapple with just this question.

This local content survey is a milestone, in that it reflects a change of direction and a change of gear for local content on New Zealand television. It is heartening to see that the increase in overall quantity has been matched by improvements in the diversity of programming on offer.

The 2002 results have occurred as a result of strong broadcaster commitment, high-level government support for public service broadcasting and the skills of an increasingly experienced production sector.

NZ On Air has observed strong continuing support for New Zealand programmes by local audiences. In the latest NZ On Air research 62% of respondents said they believed that the amount of local content shown on New Zealand television should increase.¹ In the words of one focus group participant, "We've got lots of stories... there's the interest factor but there's also that they can show what being New Zealand, being kiwi, is - what we're like."² These results in combination with the 2002 local content survey figures, give a strong signal that the outlook is for increased local content, improved diversity and for positive audience response to remain on an upward path and grow over time.

Don Hunn

Chairman

March 2003

1 NFO New Zealand: Public Information & Opinion Monitor (July 2002)

2 NFO New Zealand: Audience Attitudes Towards NZ On Air-funded TV Programmes (October 2002)

Executive Summary

The main trends in the screening of New Zealand-produced programmes on the three nationwide television channels in 2002, since the last local content survey of 2001 programmes, were:

Hours

- Total hours of local programmes increased markedly with 7,201 hours broadcast in 2002 compared to 6190 hours in 2001 (refer fig 1)
- Total first-run hours (prime time and offpeak) increased from 5151 hours in 2001 to 5748 in 2002 (refer fig 2)
- Total repeat hours increased by 414 to 1453 hours (refer fig 4)
- These changes mean that the percentage of total broadcast hours made up by local content increased markedly, from 23.6% in 2001 to 27.4% in 2002 (refer Appendix 3)
- The increase in first-run hours was mainly due to an increase in sports coverage
- News and Current Affairs remains the single largest local content genre, despite a decrease of 4% of total local hours. In 2002 News and Current affairs contributed to 29% of total broadcast hours (refer Appendix 3)

Channel Output (refer Appendix 2)

- As a percentage of their total broadcast hours (24 hours a day) channel output was as follows:
 - TV One screened 37% first-run local content, a 2% increase over 2001 figures
 - TV2 screened 14.5% first-run local content, up 3.5% on 2001
 - TV3 screened 14% first-run local content, up 1% on 2001
- As a percentage of their prime time hours (6pm - 10pm):
 - TV One screened 57% first-run local content (54% in 2001) and 19% when news and current affairs are excluded.
 - TV2 screened 20% first-run local content (20% in 2001) and 19% excluding news.
 - TV3 screened 41% first-run local content (37% in 2001) and 13% when news and current affairs are excluded.

Channel Increases

- TV One experienced a significant increase in first-run sports hours as a result of the Louis Vuitton Cup, the Commonwealth Games and basketball and hockey coverage
- TV One continued to gain ground in drama/comedy hours
- TV One increased its prime time local content by 58 hours
- TV2 greatly increased first-run information and entertainment hours (up 128 hours)
- TV2 increased the hours of sports coverage threefold to a total of 88 hours
- TV3 increased first-run children's programming by 50 hours
- TV3 increased its prime time local content by 66 hours
- TV3 increased the total number of drama/comedy hours by 33 to achieve 68 hours

Channel Decreases

- TV2 decreased first-run output in Children's by 45 hours
- Maori programming on TV3 reduced by 20 hours returning to 2000 levels

Other (refer Appendix 7, 10 and 11)

TV4 and Prime are the two 'semi-national' free-to-air channels. The level of local content on Prime dropped from 697 hours in 2001 to just 40 hours in 2002. This was due to a content arrangement with Channel 9 Australia, which led to the demise of local news and the 'infomercial' *Prime Living*.

TV4 screens very little local material. Its total local output in 2002 was 117 hours, down 69 hours on 2001. In 2002, 34% of this total was made up of repeat programmes, compared with 27% for 2001.

At 1170 hours the Sky sports channels continue to carry the highest level of local content on Sky. Local content across other Sky channels such as Sky 1, The Living Channel, Rialto, National Geographic amounted to 561 hours, (based on a return prepared by Sky).

NZ On Air Funded Programming

NZ On Air contributed funding to 19.8% of the total New Zealand hours in 2002 (1432 hours), compared with 17.8% in 2001, 20% in 2000, 21% in 1999, 23% in 1998 and 25% in 1997.

The best indicator to the link between NZ On Air funding and hours on screen is the contribution made by NZ On Air to first-run hours. In 2002 NZ On Air contributed towards 15% (861 hours) of first-run hours, compared with 11% (544 hours) in 2001. This 4% increase reflects recent Government funding increases to NZ On Air, in 2001 and 2000. We should remember that, in percentage terms the impact of higher NZ On Air funding has also been diluted by the increases in sports and repeat hours. This trend is therefore further confirmation of the strong commitment of free-to-air broadcasters to a range of local programming.

Fourteen Years Of Local Content

This survey has measured the hours of local content on the three nationwide channels (TV One, TV2 and TV3) since 1990, with the first report covering two years. In addition, local content on some non-national operations has been collated for the last five years and some brief comments on this are contained in section 8 of this report. This recognises that, since the beginning of this survey, the television environment has expanded significantly.

In 1988, two channels were broadcasting and neither transmitted for twenty-four hours a day. Total broadcast hours nearly doubled in 1990 with the introduction of the third nationwide channel. In 2002 the television environment is markedly different, with competition to the three free-to-air national services deriving from:

- two free-to-air channels with around 70% national coverage (TV4 and Prime TV). Prime advises that it will soon achieve 95% coverage.
- over 40 pay television channels offered by TelstraClear and Sky. TV One, TV2 and TV3 are all now carried on the Sky platform, with TV One, TV2, TV3, TV4 and Prime all carried on Telstra Clear.
- independent free-to-air regional and community television comprising several small local ventures from north of Auckland to Southland.
- the Maori Television Service is now expected to commence operation in the second half of 2003, using a UHF broadcasting platform.

In this environment, the overall amount of New Zealand programming on the free-to-air national television networks has more than tripled, rising from 2111 hours in 1988 to this year's high of 7,201.

2002 Results: Total Hours

Total New Zealand programme hours broadcast on TV One, TV2 and TV3 rose by 1,011 hours, to achieve 7,201, the highest level since this survey began. This increase is mainly due to increases in repeats and offpeak programming on TV One and TV2. TV One and TV3 also had small prime time increases

NP. Total hours in News and Current Affairs, Documentary and Drama/Comedy also reached all time highs at 2111 hours, 349 hours and 447 hours respectively.

TV One

- screened 4003 hours of local content in 2002 (up 417 hours)
- continued to screen more than double the local content hours of both TV2 and TV3
- improved its first-run Drama/Comedy hours from just 5 hours in 2000 to 35 hours in 2002 (up 14 hours on 2001)
- increased first-run local content by 169 hours to achieve 3240 hours, or 37% of its total broadcast hours, up 2% on 2001
- increased repeats by 248 hours

TV2

- increased the total hours of local content screened by 454 hours to achieve 1759 hours (up 35%)
- increased off-peak first-run local content by 335 hours, to achieve 972 hours
- prime time local content remained static
- once again recorded significant increases in off-peak entertainment hours (up 201)
- increased repeats of children's shows by 62 hours
- continued to be well ahead of TV One and TV3 in the screening of New Zealand made drama and comedy
- decreased first-run children's programme hours by 45, with the result that 245 hours were screened
- broadcast 1267 hours of first-run local content (14% of total broadcast hours), up from the previous year's 934 hours (11%)

TV3

- regained some of the ground it lost in 2001, screening an additional 141 local content hours to achieve a total of 1,439 hours.
- screened 41 hours of first-run drama/comedy, an increase of 14 hours on 2001
- broadcast 1242 hours of first-run local content (up 96 hours on 2001), equivalent to 14% of total broadcast hours (up 1%)

Appendix 2 sets out the total hours results for TV One, TV2 and TV3 in 2002.

Fig 1

Total NZ hours by channel

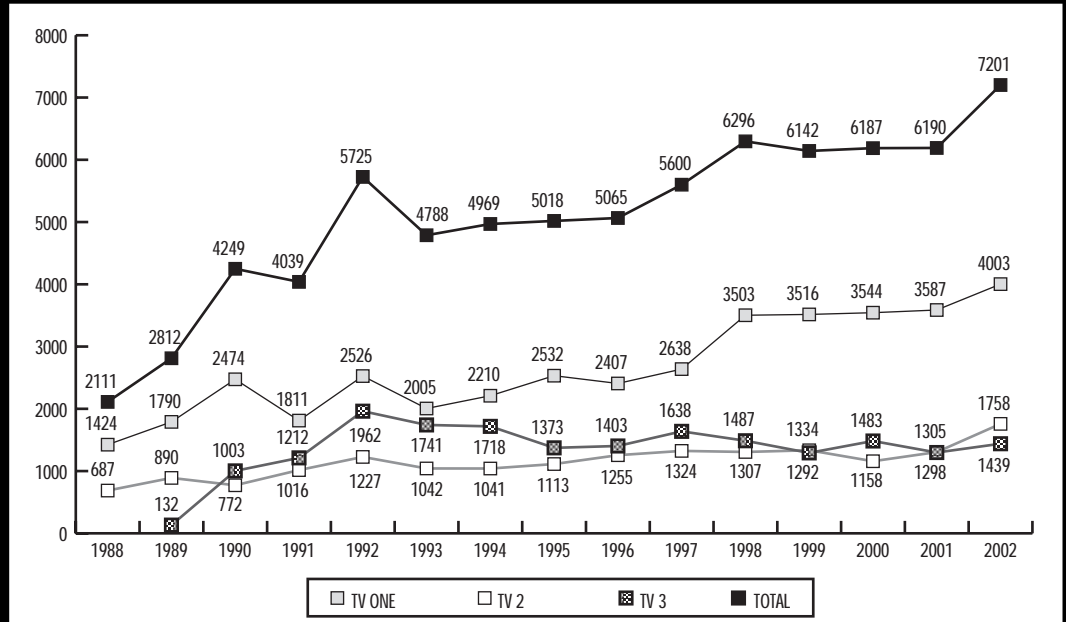


Figure 2 sets out total hours of New Zealand programming by genre from 1988 to 2002 (comprising first-run and repeats across all three channels). Comments on specific genre variations between years are made in section 8 below.

Fig 2

Total NZ Hours By Genre 1988 - 2000

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Drama/Comedy	39	59	55	86	223	264	283	357	357	336	406	364	386	363	447
Sports	509	691	1653	1283	1735	1075	1531	1545	1077	865	999	1010	1239	791	1299
News/Current Affairs	550	709	997	924	1009	1023	1087	1045	1198	1440	1751	1835	1876	2073	2111
Entertainment	292	458	528	525	886	588	364	454	302	482	453	496	433	532	703
Children's	325	440	534	739	1264	1019	861	745	783	806	600	620	591	488	583
Children's drama	12	21	25	20	33	27	2	28	12	0	13	9	6	14.5	0
Maori	131	144	143	111	163	170	156	173	218	256	255	287	371	396	387
Documentaries	43	36	107	139	175	190	207	257	252	269	334	331	242	260	349
Information	213	253	208	213	226	431	477	415	867	1147	1485	1191	1041	1272	1322
Total NZ Content	2112	2804	4249	4039	5715	4788	4969	5018	5066	5601	6296	6143	6185	6190	7201
% of Schedule	23.9%	31.8%	24.2%	31.7%	30.2%	23.2%	23.2%	19.7%	19.2%	21.3%	24%	23.4%	23.5%	23.6%	27.4%
Total Prime Time	686	943	1189	1281	1640	1769	1821	1546	1586	1636	1647	1686	1602	1629	1732
% of Schedule	23.5%	21.6%	27.2%	29.3%	37.5%	40.5%	41.7%	35.4%	36.3%	37.5%	37.6%	38.5%	36.5%	37.2%	39.5%

- Notes:
1. These hours are for TV One, TV2 and TV3 only
 2. TV3 commenced in November 1989
 3. Figures have been rounded
 4. Prime time hours for all three channels are calculated as 4380 in total

Appendices 3, 4 and 5 list the New Zealand programmes which make up the raw data for this study, for TV One, TV2 and TV3 respectively. The programme titles for series appear only on their first week of transmission.

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

In 2002, between 12.00 midnight and 6.00am:

- TV One screened 17 hours of local programmes
- TV2 screened 128 hours of local programming
- TV3 screened 4.5 hours

Excluding these totals, and based on the Australian model of an eighteen hour clock, the percentages of local content screened become:-

- TV One 60 % (54.5% in 2001)
- TV2 25% (17.4% in 2001)
- TV3 22% (19.6% in 2001)

When the average level of local content across the three channels is measured against the eighteen hour clock the percentage of local content moves from 27.4% to 35.8% overall, up 5.3% on last year. This simple analysis also shows that TV One exceeds the level of local content achieved by quota regulation in Australia (55%), but the two other free-to-air, national channels are screening local content at levels well below that comparative benchmark. It should be noted however that, apart from youth news show *Flipside*, TV2 does not carry a news service.

	Total Local Content Hours	Minus 12.00-6am	Sum	Total transmission 18 hour clock	%
TV One	4003	17	3986	6570	60%
TV2	1759	128	1631	6570	25%
TV3	1440	4.5	1436	6570	22%

5

First-run Hours

First-run hours include both 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 increases and decreases) in local programming. As Figure 2 below demonstrates, total first-run hours increased by 597 hours, from 5151 hours in 2001 to 5748 in 2002.

- sports coverage increased to levels matching 2000.
- entertainment hours gained ground again, increasing by 213 hours
- first-run Children’s hours remained relatively static due to a decline on TV2, which offset an increase on TV3
- hours of Drama/Comedy increased by 42 (20%) due to an increased commitment to these genres by TV One and TV3
- documentary hours decreased by 17%, a reversal of the 2001 result. This may be the result of TV One holding back documentary product to screen once the charter came into effect.
- Maori programmes decreased slightly for the first time since 1995
- news coverage continued to increase although at a slower rate than has been seen over the last few years
- NZ On Air contributed to 15% of first-run hours (up 4%)

Fig 3 First Run Hours (Peak And Offpeak) For All Three Channels

	News, CA	Entertainment	Sport	Doco.	Information	Drama/Comedy	Children	Maori	Total
2002	2013	604	1157	164	963	247	314	287	5748
2001	1992	391	766	197	990	205	308	295	5151
2000	1876	313	1188	168	892	181	308	256	5182
1999	1835	418	932	229	743	179	297	196	4830
1998	1745	313	945	233	729	182	342	180	4673
1997	1438	230	864	189	772	171	367	180	4211
1996	1186	154	1055	187	717	201	403	165	4068
1995	1032	270	1545	206	320	224	467	127	4191

As a percentage of their total broadcast hours (calculated as 8760):

- TV One screened 37% first-run local content (35% in 2001)
- TV2 screened 14.5% first-run local content (11% in 2001)
- TV3 screened 14% first-run local content (13% in 2001)

If, once again, we adjust the calculation for first-run local content to reflect the 18 hours from 6.00am to midnight, then

- TV One screened 49% first-run local content (46.7% in 2001)
- TV2 screened 19.2% (13.3% in 2001)
- TV3 screened 18.8% (17.4% in 2001)

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

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

TV One

- first-run local content increased by 169 hours to reach an all time high of 3240 hours
- experienced a significant increase in first-run sports hours
- continued to gain ground in drama/comedy hours, almost reaching the 1995 level of 41 hours

TV2

- first-run local content increased by 333 hours to reach an all time high of 1267 hours
- decreased first-run output in Children's
- greatly increased first-run information and entertainment hours
- increased the hours of sports coverage almost threefold
- stayed well ahead of the other two channels in Drama/Comedy
- remained in third place in terms of first-run local content (due to the channel's low news output)

TV3

- first-run local content increased by 97 hours to achieve an all time high of 1242 hours
- increased first-run children's programming by 50 hours from a very low base
- doubled drama/comedy programming to reach an all time high
- Maori programming returned to 2000 levels

Fig
4

First Run Hours (Peak And Offpeak) By Channel

TV ONE	News, CA	Entertainment	Sport	Doco.	Information	Drama/Comedy	Children	Maori	Total
2002	1439	54	750	87	685	35	0	190	3240
2001	1142	70	423	103	832	21	0	182	3071
2000	1347	77	759	91	793	5	0	163	3235
1999	1324	74	758	121	670	25	0	144	3116
1998	1328	65	751	132	676	14	0	140	3106
1997	1002	60	562	108	438	24	8	146	2349
1996	757	46	748	121	249	20	1	122	2064
1995	526	131	1066	128	229	41	28	127	2276
TV2									
2002	19	506	69	33	189	153	250	47	1267
2001	8	291	21	56	61	157	294	47	934
2000	11	205	20	37	43	167	271	47	801
1999	4	290	71	48	30	145	255	48	889
1998	0	182	36	28	25	144	210	40	665
1997	18	125	121	20	281	119	198	34	916
1996	0	75	102	9	378	136	209	44	953
1995	89	77	197	18	7	135	243	0	588
TV 3									
2002	556	45	338	45	89	59	64	47	1242
2001	542	30	322	38	98	28	14	67	1145
2000	518	31	409	40	57	10	37	47	1149
1999	507	55	103	61	43	10	43	3	825
1998	421	67	158	73	28	23	132	0	902
1997	418	45	181	60	52	28	162	0	946
1996	429	33	205	57	89	44	193	0	1050
1995	417	62	282	61	85	49	197	0	1153

6

Repeat Hours

Repeated programmes are not usually a feature of prime time (although levels are higher over the summer holidays). Repeat programmes are screened by channels partly as a result of the demands of 24-hour transmission (ie. the need to screen 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 (ie. repeat screenings are mostly utilised at no cost).

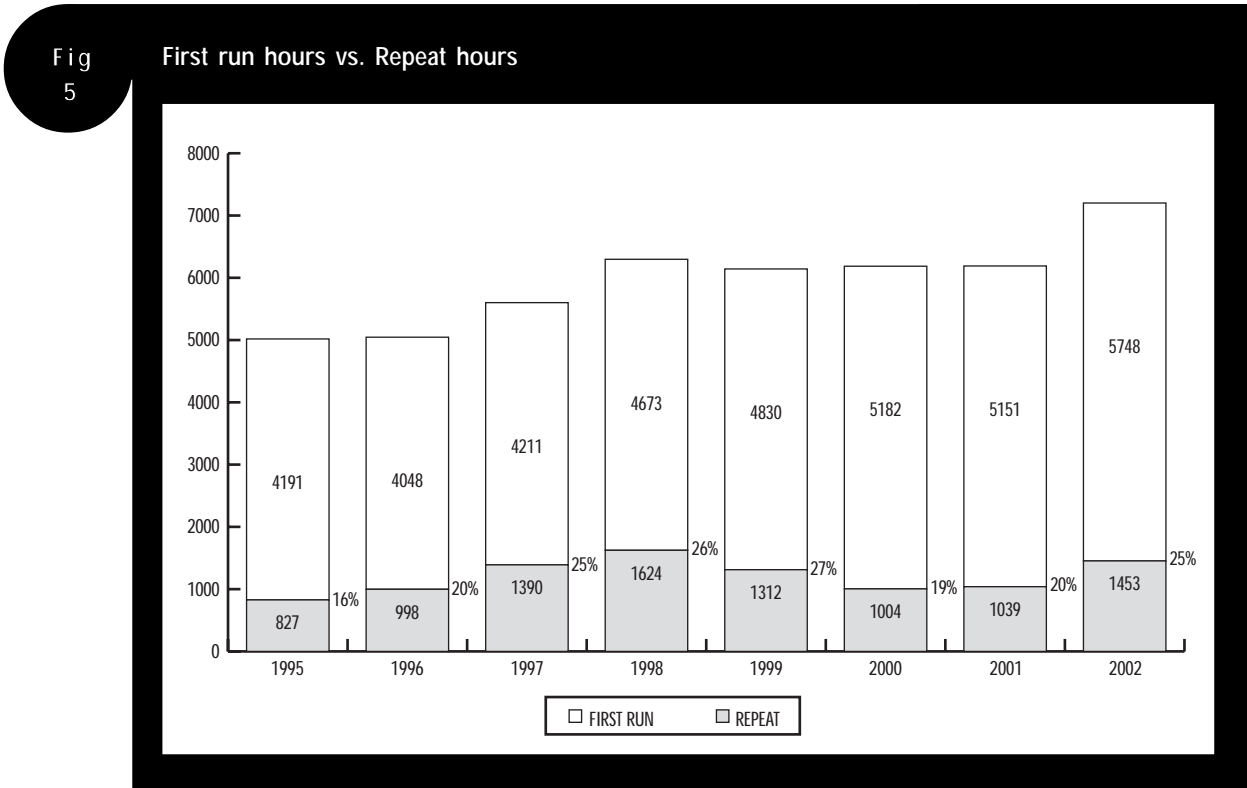
Some programmes, such as preschool children’s programmes, are designed to be repeated and have a long shelf life so that they may serve different emerging audiences.

The total for hours of repeats in 2002 was 1453, up 414 from the 1039 hours recorded in 2001.

TVNZ’s and TV3’s decisions to cancel infomercials were the main reasons for this, as these were in part replaced by repeats of New Zealand programmes. TV One increased repeats of local shows by 248 hours and TV2 increased repeats by 121 hours.

The increase is spread across genres and, to a lesser extent, across channels. The biggest contributors were documentaries and sport on TV One and children’s, information and drama/comedy on TV2. On TV3 only children’s programmes significantly increased in terms of repeat hours.

These changes have meant that for 2002, repeat programmes (as a proportion of first-run hours) rose to 25% (from 20% in 2001), the highest proportion since 1999.



Prime Time Hours

Prime time figures are a useful guide to whether production spending by the television networks is holding its own. As prime time (6.00pm – 10.00pm) 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.

Total local content hours in prime time were 1732 in 2002, representing an increase of 103 hours over 2001. At this level, local content accounted for 39.5% of prime time hours, and compared with 1629 hours (37.2%) for 2001.

The growth in prime time hours was due to increases in drama/comedy, sports, news and current affairs and entertainment which outstripped decreases in documentaries and information programmes.

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

In 2002 NZ On Air contributed to 12.5% of prime time local content, compared to 11% in 2001.

As a percentage of their prime time schedules (calculated as 1460 hours per channel):

- TV One screened 57% local content (54% in 2001)
- TV2 screened 20% local content (20% in 2001)
- TV3 screened 41% local content (37% in 2001)

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

- TV One: 19% (17% in 2001)
- TV2: 19% (20% in 2001)
- TV3: 12.8% (10% in 2001)

TV One

- once again screened the most prime time local content of all channels. The channel screened a total of 833 hours in 2002, an increase on 2001's 795 hours

TV2

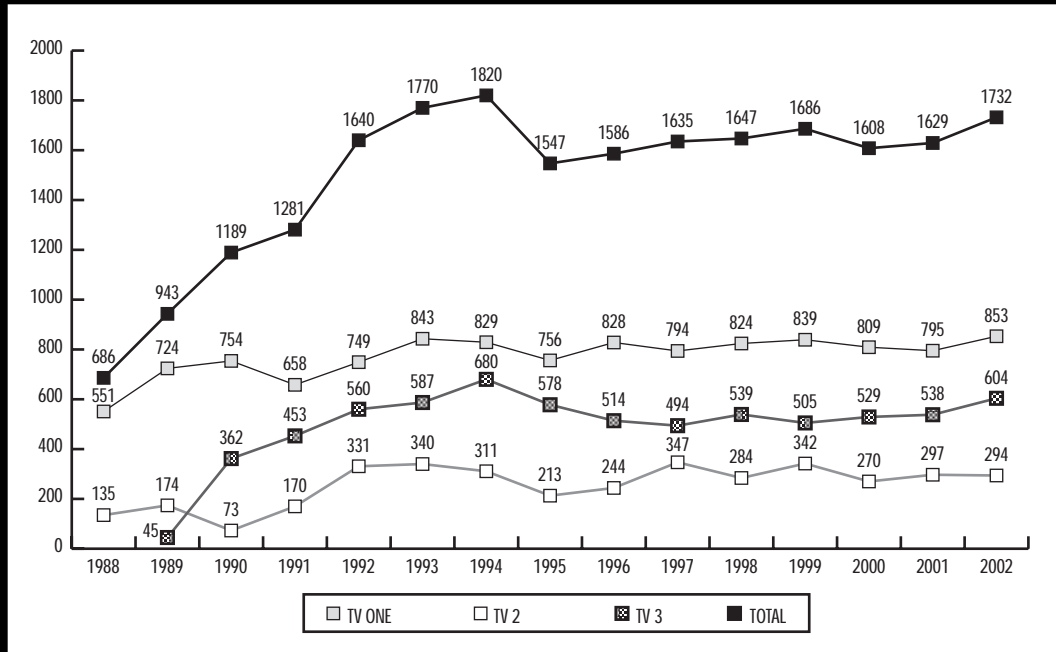
- stayed relatively static, with local content in prime time reducing by only 2 hours
- decreased transmission of prime time drama/comedy by 9 hours, which is a 19 hour decrease since 2000

TV3

- increased prime time local content screened by 66 hours
- increased the number of drama/comedy hours screened by 14
- increased prime time sports coverage by 35 hours

Fig 6

Prime time hours by channel



8

Trends by Genre

A brief comment on the 2002 trends by genre follows. Statistics for each of the nine genres by channel are summarised in Appendix 2. Appendix 3 provides a complete table of hours by genre since 1988.

Drama/Comedy

Total hours of drama/comedy increased by 84 in 2002. This was due to a combination of an improvement in first-run hours on TV One and TV3 and an increase in repeats on TV2.

TV2 remains well ahead of both TV One and TV3 with *Shortland Street* continuing to dominate the TV2 drama output, with daily first-run and repeat screenings. A third 13 part series of *Street Legal* screened. Perennial *Pulp Comedy* returned, as did *Havoc and Newsboy*. The achievement of an all time high of 323 hours was achieved by a 36 hour increase in repeats.

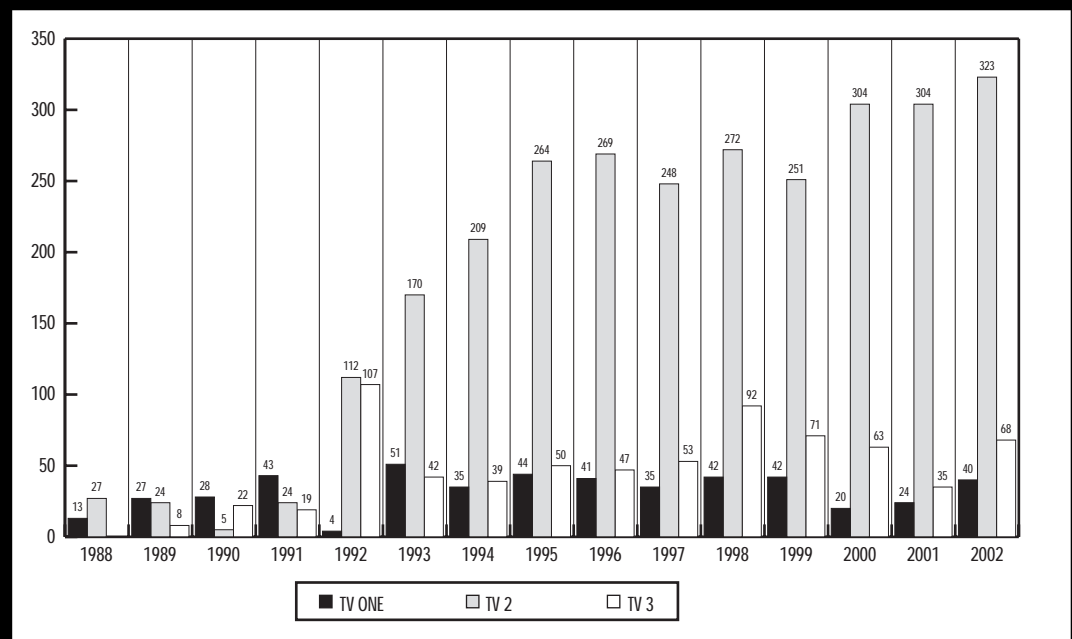
TV One's first-run hours improved by 19 hours in 2002, with *Mercy Peak* screening along with returning comedy series *Spin Doctors* and *Willy Nilly*. Total hours on TV One improved by 16 to reach 40.

TV3's total drama/comedy hours bounced back from 35 hours in 2001 to 68 hours in 2002. The channel's commitment to the genre in prime time was reflected in an increase of 14 hours, which contributed to a total of 41 hours. New show *The Strip* and return series, of *The Panel* and *The Great Comedy Debates* were mainly responsible for this.

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

Fig 7

Total NZ drama hours by channel



Sport

Total sports coverage can fluctuate dramatically, largely affected by major international events such as the Olympic Games (1992, 1996 and 2000), Commonwealth Games (1990, 1994 and 1998) or The America's Cup. None of these events featured in 2001, so in 2002, coverage of the Louis Vuitton Cup, the Commonwealth Games, Basketball World Championships, other basketball coverage and hockey internationals resulted in a significant increase on TV One, which was the main contributor to the rise in total sports hours. Total hours rose dramatically by 508 to 1298 hours.

The breakdown of sports coverage by channel is as follows:

TV One broadcast double the number of sports hours screened in 2001, with an increase of 434 hours.

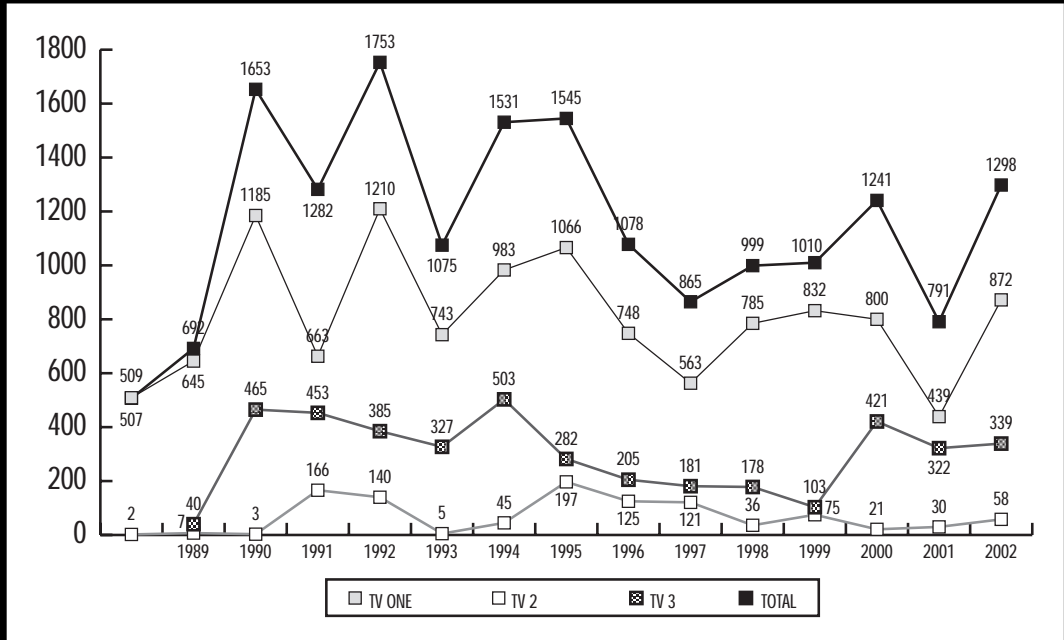
TV2's hours all but doubled to 58, with the addition of Heineken Open tennis, Primo Freerider and Vodafone X Air.

TV3's total sports hours increased by 17 with the channel continuing to concentrate on the major sporting codes such as rugby, rugby league and cricket.

Sports programmes are generally not funded by NZ On Air.

Fig 8

Total NZ sports hours by channel



News And Current Affairs

There was a 38 hour increase in the total number of news and current affairs hours.

TV One continued with its early morning *Breakfast* and *Business News*, which were first introduced in August 1997. The channel's staples continued to be the daily *One News* which runs for a full hour, including weekends, and the weekday *Holmes*, *Late Edition* and *Midday*. Weekly, *Assignment* returned, *Sunday* debuted and *60 Minutes* migrated to TV3.

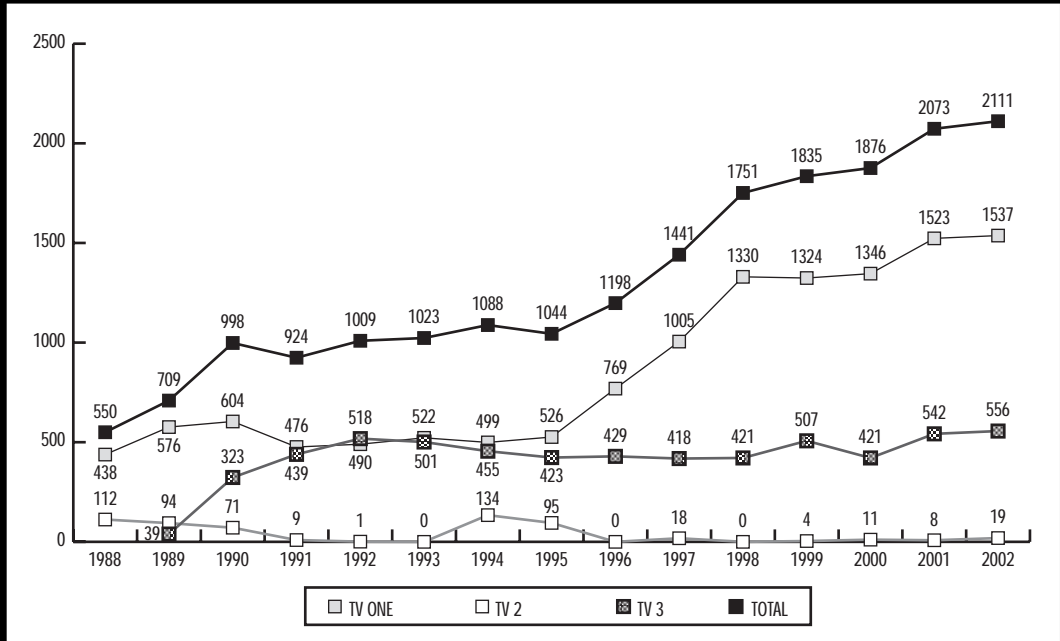
TV3 continued with the daily *3 News* and *Nightline*. The channel also continued with its hourly *3 News Update*, which has been allocated at 2'30" per day (this production is not recorded in the *Listener*). In current affairs, *20/20* continued and *60 Minutes* moved from TV One.

TV2 discontinued its hourly *Newsbreaks*, but its hours increased by 10, to reach 18, due to the introduction of youth news and current affairs show, *Flipside*.

News and current affairs programmes are not normally funded by NZ On Air. *Flipside* is an exception, funded from the innovation category NZ On Air had put in place for 2000/01 and 2001/02.

Fig 9

Total NZ news & current affairs hours by channel



Entertainment

Total entertainment programming increased by 171 hours in 2002 to reach 703 hours.

For the second year running first-run hours in this genre were boosted by a large increase in the number of offpeak hours on TV2. In 2002, TV2 screened 201 more hours of off-peak entertainment programming than in 2001. With 562 hours, TV2 screened many times the number of hours of entertainment programming broadcast by TV One and TV3. The significant increase in this genre on TV2 is mainly due to the screening of a full year of *M2*, a music show playing from midnight to 6.00am on Thursdays, Fridays and Saturdays. New series on TV2 in this genre included *The Chair*, *The Mating Game*, *100 Hours* and *Treasure Island Extreme*. Returning series on TV2 included *Mitre 10 Dream Home*, *Squeeze*, *Coca Cola Chart Show*, *Weddings* and *Treasure Island*

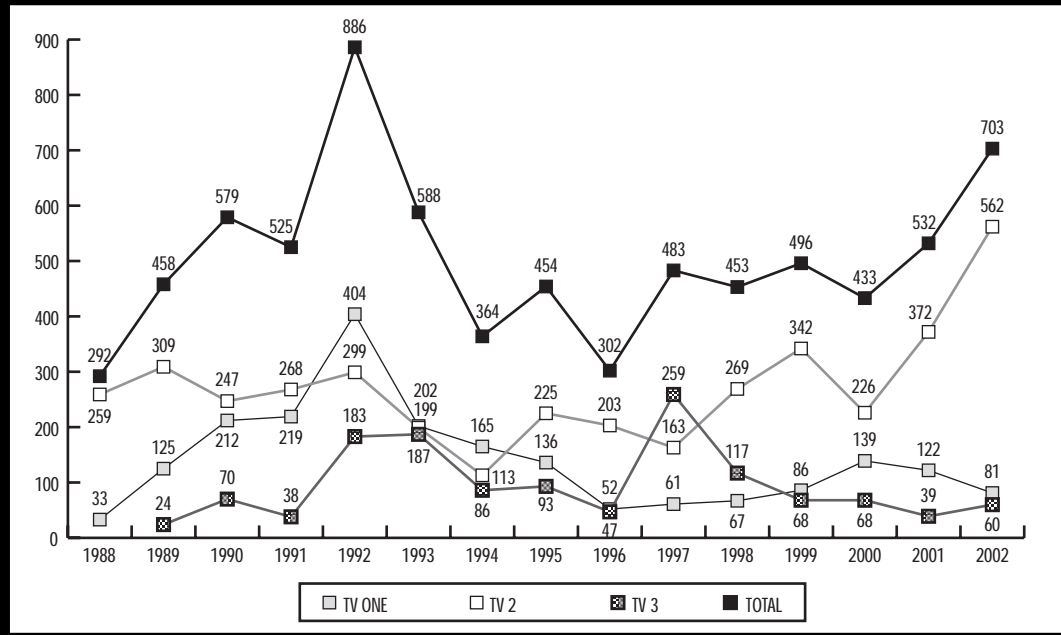
Total hours for TV One dropped by 41, mainly due to a drop in repeats and off-peak programmes, to reach 81 hours. *Taste New Zealand* returned, as did *Mucking In*, *The Weakest Link* and *A Game of Two Halves*.

Total entertainment hours for TV3 increased by 21 to reach 60 hours, which approaches the levels attained in 1999 and 2000. Shows on TV3 included, *You Ain't Seen Nothing Yet*, *Gather Round*, *Travel.co.nz* and *Christmas in the Park*.

Entertainment programmes are generally not funded by NZ On Air as they rarely require a subsidy to be made. Exceptions have included some performance-based series and youth series such as *Polyfest 2001*, *Space* and *Squeeze*. NZ On Air also contributed to *M2* as part of its Phase Four initiative for New Zealand music.

Fig 10

Total NZ entertainment hours by channel



Children's

2002 saw an increase in this genre of almost 100 hours after nearly a decade of decline. This year a total of 583 hours of local children's programming screened, compared with 488 for 2001.

Again TV2 was the main provider of children's programming, with a total of 375 hours, an increase of 18 over 2001. First-run local hours on TV2 decreased, however, by 45 hours to reach 250 hours in 2002. This decrease was balanced by an increase in repeats of 62 hours. It should be remembered that repeats are valid programming for younger children, particularly pre-schoolers, who learn through constant repetition. Many children's shows are designed to have a long shelf-life so that they may serve emerging audiences.

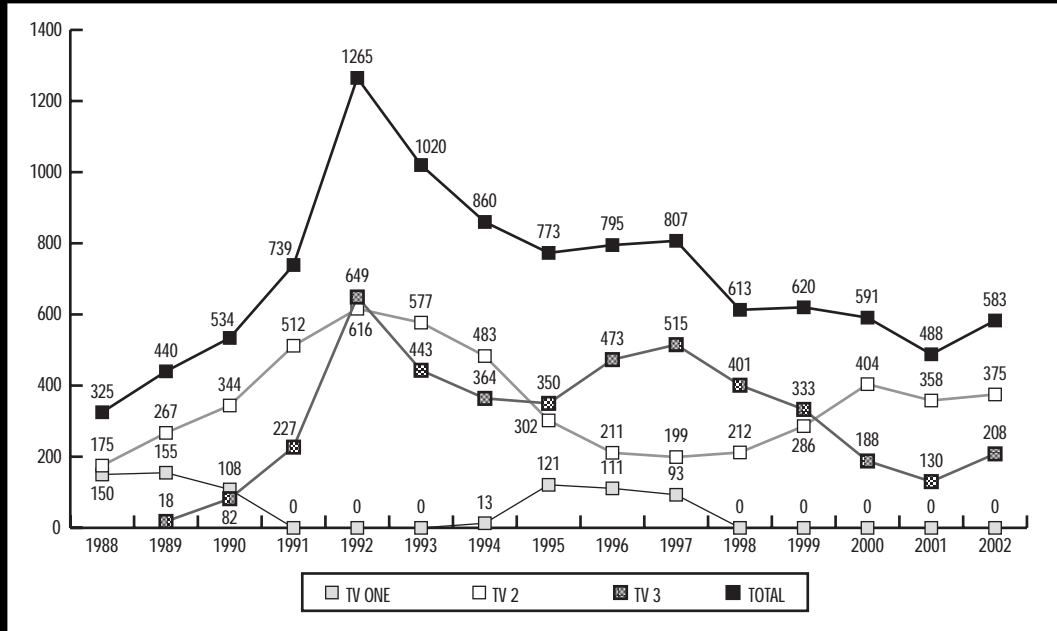
Total hours on TV3 increased by 78 hours to 208 in 2002. This was almost entirely due to the debut of Sticky TV, a children's variety show.

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

NZ On Air is the main funding contributor to children's and young persons' programming. NZ On Air provided just over \$11.2 million of funding towards the production of around 372 first-run hours in the 2001/2002 funding year. This compares with \$10 million for 325 hours the year before and underscores the point that increases in local content in this genre are heavily dependent on NZ On Air funding. The necessity for off-peak timeslots means that broadcasters will not commission this genre without substantial financial assistance.

Fig 11

Total NZ children's hours by channel



Maori Programmes

The rise in programming made predominantly by Maori for Maori (whether in Te Reo or English) which has been continuing since 1994 reversed slightly in 2002. Total hours decreased from 396 in 2001 to 387 in 2002.

The three main ongoing programmes on TV One (which continues to have by far the most Maori programming) were *Marae*, *Waka Huia* and *Te Karere*. TV One's total hours in this genre increased by 14, to achieve 256 hours. First-run hours on TV One increased to 190 hours from 182 in 2001.

Total hours for TV2 decreased by 2 to reach 85 hours. First-run hours increased by 4 to reach 51, with a 6 hour decrease in repeats. Youth series *Mai Time* continued as did music show *He Wai. Tu Te Puehu* also returned.

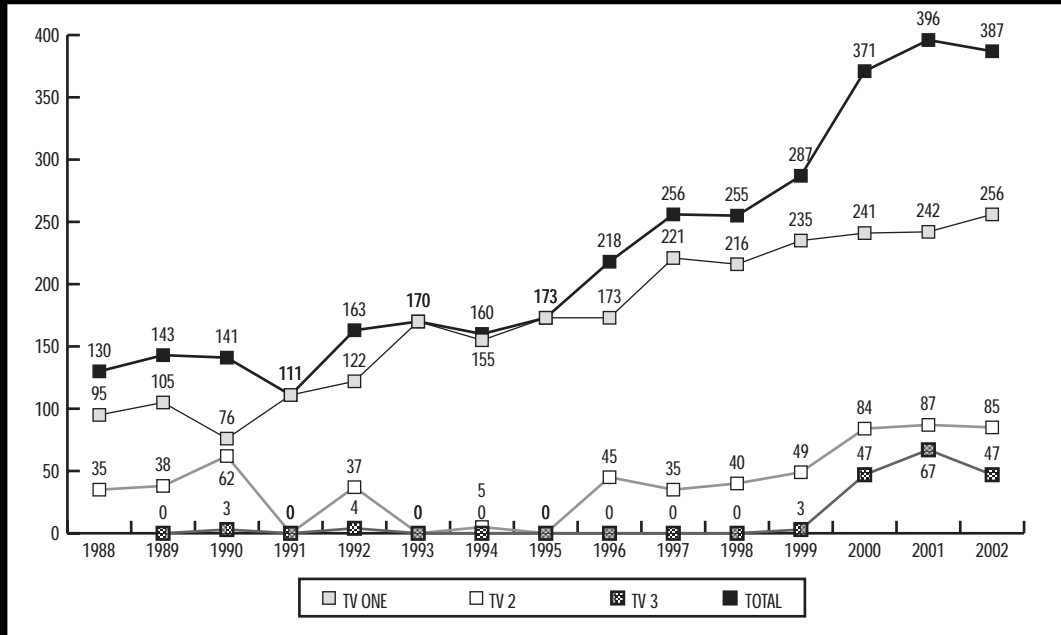
The gains made in TV3's total hours in 2001 were reversed in 2002. Total hours dropped by 20 to reach 47. As in 2001, TV3 again screened no repeats in this genre.

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

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

Fig 12

Total Maori programmes by channel



Documentaries

Total documentary hours increased by 89 hours, from 260 in 2001 to 349 in 2002 . This was driven mainly by a 97 hour increase in repeats on TV One.

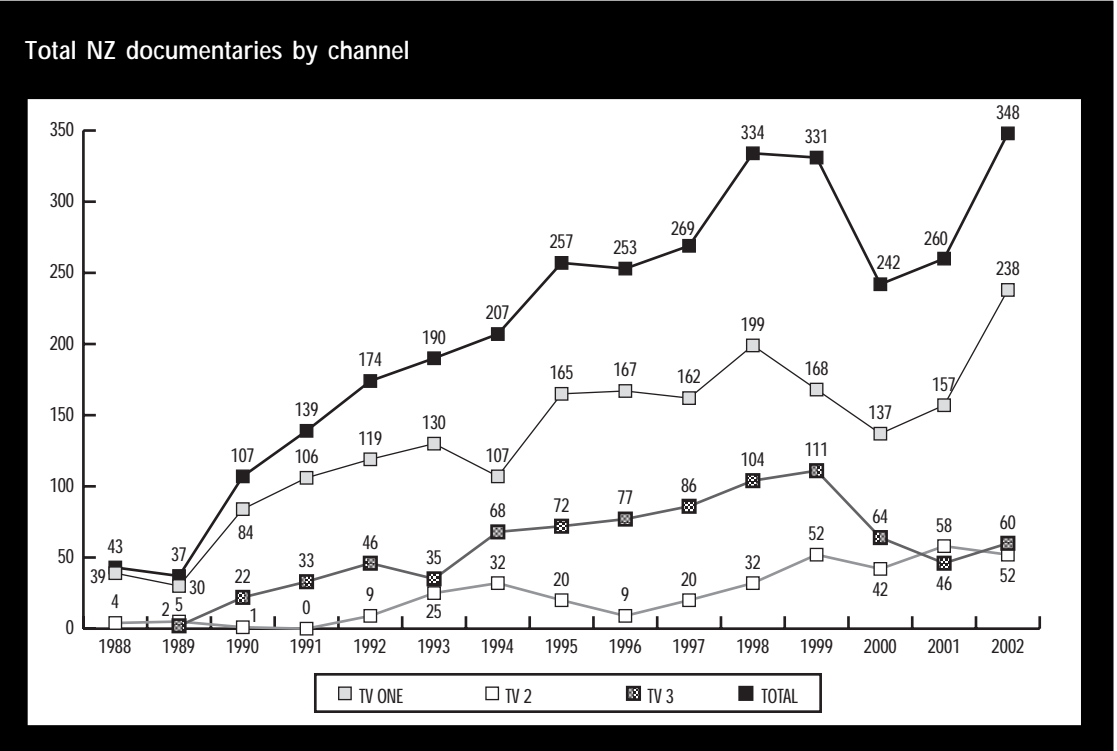
TV One screened twice the number of documentary hours of the other two channels put together; increasing its total documentary hours by 81. New series on TV One in 2002 included *Park Rangers*, *Kids Hospital*, *The Tamaki Brothers in Hog Heaven* and *Border Patrol*. Returning series included *Location, Location, Location*, reality series *Country Calendar*, and *The Zoo*. *Documentary New Zealand* entered its fifth year.

TV2's hours slipped back slightly after 2001's all time high to 52, down 6 from 2001. A 22 hour decline in first-run hours was almost compensated for by an 18 hour increase in repeats. TV2 introduced a seven part strand of occasional documentaries, which included, among others, *Gang Girls* and *The Quick and the Dead*. *Crime Busters* debuted, and *Choppers* and *Motorway Patrol* returned.

TV3's total hours increased by 14 to reach 60 hours in 2002. The main reasons for this were small increases in repeats and offpeak screenings. *Inside New Zealand* returned for its eleventh year and *School Rules* and *Life Goes On* were introduced.

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

Fig 13



Information

The total information hours, across all networks, increased by 50 hours from 1272 hours in 2001 to 1322 hours in 2002.

This increase was mostly due to a big increase in offpeak hours on TV2, due to the emergence of religious show *Destiny Television*, which plays each weekday.

TV One's overall information programming decreased significantly. Prime time hours decreased by 24 hours to 63. Off-peak hours dropped by 122 due to the dropping of *Today Live*. *How's Life* was the major debut programme in terms of hours. *Troubleshooters* debuted and *The Big Art Trip* and *Mercury Lane* returned. Other returning prime time information series included *Home Front*, *Taste New Zealand*, *Going Going Gone*, *Maggie's Garden Show*, and *Fair Go*. Off-peak returning series included *Asia Down Under*, the Christian series *Praise Be*, and *Inside Out* for people with disabilities.

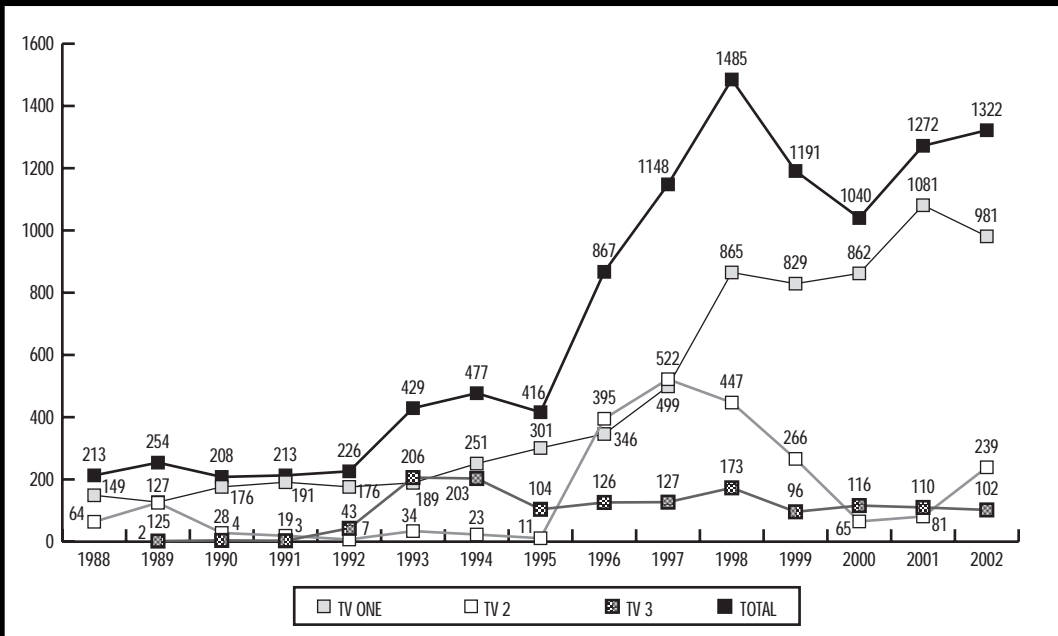
TV2's information programming increased by 158 hours mostly in off-peak hours (See note above re. *Destiny Television*). By contrast prime time information hours on this channel increased by only 3 to achieve 44 hours. New TV2 titles in this genre were *Body Wise*, *Police Ten-7* and *The Money Game*. Returning series were *Love that Car* and *Motorway Patrol*, with *Queer Nation* screening off-peak.

TV3's total hours in this genre decreased by 8 to reach 102. New series included *Busted* and *Live This*. Consumer issues series *Target* continued, along with *Gone Fishing*, *Mazda Outdoors* and the rural show *No. 8 Wired*. TV3's prime time hours in this genre were down 9 hours to 29 in 2002. Repeats and off-peak hours both remained static.

NZ On Air funds some programmes in this category, mostly Special Interest programming for TVOne, such as *Asia Down Under*, *Inside Out*, *Tagata Pasifika*, *Queer Nation* on TV2 and *Open Door* on TV3.

Fig 14

Total NZ information programmes by channel



Non-National Channels

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

Figures are attached as Appendices 7, 8 and 9.

Free To Air

TV4's percentage of local content decreased from 5.6% to reach 4.6% in 2002. Its prime time first-run programmes decreased from 79 hours to 71 hours. Repeat hours dropped to 6 hours.

The level of local content on Prime dropped significantly from 697 hours in 2001 to just 39 hours in 2002. This was due to a content arrangement with Channel 9 Australia, which led to the demise of local news and the 'infomercial' *Prime Living*.

TV4 Hours

	Prime	Offpeak	Repeat	Total
2002	71	40	6	118
2001	79	56	51	186
2000	52	12	102	166
1999	36	35	48	119
1998	63	9	78	150
1997	43	109	36	188

Prime TV Hours

	Prime	Offpeak	Repeat	Total
2002	2	12	27	39
2001	21	388	288	697
2000	15	393	245	653
1999	68	418	501	987
1998	44	190	148	382
1997	0	0	0	0

Sky Television

Figures for Sky channels were collated by Sky.

- Sky Sport channels screened 1170 hours (1600 in 2001).
- Sky 1 screened 99 hours of local content, The Living Channel 119.5 and National Geographic screened 51 hours.
- Sky also screened 169 hours of New Zealand news programming.
- Rialto Movie Channel screened 122 hours of New Zealand feature film and documentary.

No NZ On Air funding is currently allocated to programmes commissioned by Pay-TV channels.

Regional Channels

Since this survey began there has been a burgeoning of smaller regional and community channels. At least 15 such channels now operate, from the far North to Invercargill, claiming a total potential audience of almost 2.7 million.

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 but 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 22,225 hours of locally-made or locally-provided programmes. A locally-provided programme is one purchased from overseas by a local community group, with broadcast time then purchased from the local channel. A locally-made programme is just as it sounds. 6561 hours of the total are first-run and 14,445 hours are repeats. The Chairman of the RTB says that of the 6561 first-run hours claimed, 4,932 are locally made and the remainder are locally provided.

Notes:

- Recording local content on smaller and pay channels is more difficult, since less information is included in *Listener* billings. This year Sky's figures were taken from a return provided by Sky (Appendix 9).
- Regional break-out programmes, such as the local news and *Prime Living* programmes on Prime, have been counted as only one programme even though the five regions may have different programmes screening simultaneously. This is to avoid distortion.
- Filler programmes such as New Zealand music videos are not included, just as filler programmes are not included for the national channels.

Notes On Methodology

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

Drama/Comedy

This category contains all New Zealand-made drama and comedy, other than drama made for children.

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 *Tux Wonder Dogs*, broad competitive formats such as *Changing Rooms*, *Mitre 10 Dream Home* and *Ground Force* plus light entertainment such as *Space*.

Children's

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

Children's Drama

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

Maori Programmes

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

Documentaries

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

Information

This category comprises a wide range of programme types, generally with a magazine format and/or an information as opposed to an entertainment or competitive flavour. Examples include series such as *Maggie's Garden Show*; religious series such as *Praise Be*; arts and culture programmes such as *Mercury Lane*; leisure and lifestyle series such as *How's Life*; and special interest series such as *Inside Out*.

For All Programmes Screened

Year 2002

Category:	TV One				TV2				TV3			
	Prime	Repeat	Offpeak	Total	Prime	Repeat	Offpeak	Total	Prime	Repeat	Offpeak	Total
Information	63.00	295.75	622.25	981.00	44.00	50.50	144.50	239.00	29.00	13.00	60.00	102.00
Documentaries	81.00	150.33	5.75	237.08	32.50	19.00		51.50	35.50	15.50	9.00	60.00
Maori Programmes		66.00	189.50	255.50		34.00	50.50	84.50			47.17	47.17
Children's Drama												
Children's						125.42	249.92	375.33		143.42	64.22	207.63
Entertainment	53.50	27.00	0.50	81.00	61.38	56.00	444.33	561.72	17.00	15.58	27.58	60.17
News/Current Affairs	554.00	98.25	884.83	1,537.08	17.50		1.00	18.50	416.50		139.08	555.58
Sports	50.00	121.67	700.58	872.25	3.00	19.50	65.67	88.17	65.17	1.00	272.33	338.50
Drama/Comedy	33.50	4.50	1.50	39.50	136.00	187.50	16.50	340.00	41.00	9.00	18.00	68.00
Totals	835.00	763.50	2,404.92		294.38	491.92	972.42		604.17	197.50	637.38	
Total New Zealand Broadcast Time:	4,003.42				1,758.72				1,439.05			
Total Broadcast Time:	8,760.00				8,760.00				8,760.00			
N.Z. Content Percentage of Total Broadcast Time:	9.5%	8.7%	27.5%	45.7%	3.4%	5.6%	11.1%	20.1%	6.9%	2.3%	7.3%	16.4%
All Three Channels												
Total New Zealand Prime Time:	1,733.55	Total Prime Time:		4,380.00	N.Z. Content Percentage of Total Prime Time:		39.6%					
Total New Zealand Repeat Time:	1,452.92	Total Repeat Time:		26,280.00	N.Z. Content Percentage of Total Repeat Time:		5.5%					
Total New Zealand Offpeak Time:	4,014.72	Total Offpeak Time:		21,900.00	N.Z. Content Percentage of Total Offpeak Time:		18.3%					
Total New Zealand Broadcast Time:	7,201.18	Total Broadcast Time:		26,280.00	New Zealand Content Percentage:		27.4%					

TV One

Week 1:

Title: **Trio at the Top (R)**
 Category: Documentaries
 Time: 1.00
 Company: TVNZ

Title: **One News Late Edition**
 Category: News and Current Affairs
 Time: 0.50
 Company: TV One

Title: **One News**
 Category: News and Current Affairs
 Time: 1.00
 Company: TV One

Title: **Midday**
 Category: News and Current Affairs
 Time: 0.50
 Company: TV One

Title: **1951 (R)**
 Category: Documentaries
 Time: 1.50
 Company: Bates Productions

Title: **Te Karere (R)**
 Category: Maori Programmes
 Time: 0.25
 Company: TV One

Title: **Te Karere**
 Category: Maori Programmes
 Time: 0.25
 Company: TV One

Title: **One Sport: ASB Bank Tennis Classic**
 Category: Sports
 Time: 4.00
 Company: TV One

Title: **Maggie's Garden Show (R)**
 Category: Information
 Time: 1.00
 Company: TV One

Title: **Risk**
 Category: Entertainment
 Time: 0.50
 Company: Denis Spencer Productions

Title: **Spin Doctors (R)**
 Category: Drama/Comedy
 Time: 0.50
 Company: Comedia Pictures Limited

Title: **The Best of Today Live (R)**
 Category: Information
 Time: 0.50
 Company: TV One

Title: **Homefront (R)**
 Category: Information
 Time: 1.00
 Company: TV One

Title: **One Sport: Horse Racing Auckland Cup**
 Category: Sports
 Time: 2.00
 Company: TV One

Week 2:

Title: **One Sport: Telstra Hyundai NZ Golf Open (R)**
 Category: Sports
 Time: 1.00
 Company: TV One

Title: **One Sport Shell Helix Motorsport**
 Category: Sports
 Time: 0.17
 Company: TV One

Title: **One Sport: IRB World Sevens at Chile**
 Category: Sports
 Time: 2.00
 Company: TV One

Title: **Breakfast**
 Category: News and Current Affairs
 Time: 2.00
 Company: TV One