

Public Information and Opinion Monitor

August 2006

Prepared for:



Prepared by:



Table of Contents

	Page
1.0 Executive Summary	1
1.2 Main Sample.....	1
1.3 Māori and Non- Māori Comparisons	6
1.4 Conclusions	9
2.0 Background.....	11
3.0 Methodology.....	12
4.0 Awareness of NZ On Air	15
4.1 Prompted Awareness of the Organisation.....	15
4.2 Spontaneous Understanding of NZ On Air.....	17
4.3 Is NZ On Air Part of TVNZ?.....	21
4.4 Is NZ On Air Part of Radio New Zealand?.....	23
4.5 Prompted Awareness of NZ On Air Functions.....	25
4.6 Attitudes Towards NZ On Air and Local Content.....	30
4.7 Quality of Programmes and Services Provided by NZ On Air	34
5.0 Use of NZ On Air Funding.....	37
5.1 Buying Programmes Made Overseas.....	37
5.2 Programmes Funded by NZ On Air	39
5.3 Knowledge of Programmes Funded by NZ On Air	43
5.4 Opinion on the Services NZ On Air Should Fund.....	45
5.5 Use of Further Funding.....	51
6.0 New Zealand Television	54
6.1 Perception of the Amount of New Zealand Made Programmes	54
6.2 Should the Amount of New Zealand Local Content on Television Increase?.....	56
6.3 Opinion on New Zealand’s Television Local Content, Given the Local Content Levels in Other Countries	58
6.4 Compulsory Screening of New Zealand Made Programmes	60
6.5 Compulsory Screening of New Zealand Made Programmes Given the Expense.....	63
7.0 Television Viewing and Radio Listening Behaviour	66
7.1 New Zealand Music on the Radio.....	66
7.2 Opinions About (the Importance of) New Zealand Music on the Radio.....	68
7.3 Radio and Television Programmes Regularly Listened to or Watched	71
7.4 NZ On Air Programme Viewing Behaviour	77

8.0	Digital Television	84
8.1	Tuning into Television channels	84
8.2	Set Top Box.....	86
8.3	Preferences towards Digital Television	94

Appendix

1.0 Executive Summary

This report summarises the findings of the NZ On Air 2006 Public Information and Opinion Monitor. TNS has conducted the monitor annually since 1992.

This year, new questions were added to the survey to measure awareness, viewing and preference for Digital Television.

Telephone interviews were conducted with n=770 randomly selected respondents from throughout New Zealand. An additional n=220 interviews were conducted with respondents of Māori ethnicity, selected from the Māori electoral role.

1.2 Main Sample

Awareness of NZ On Air

- In 2006, nine in ten (93%) people are aware of NZ On Air. This has not appreciably changed since 2003 (91% in 2003, 92% in 2004, and 92% in 2005).
- As in previous years, on a spontaneous (unprompted) basis, the most frequently mentioned main function of NZ On Air is 'funding New Zealand programmes' (24% - a significant increase from 17% in 2005). Compared to 2005, significantly more people also reported 'ensuring New Zealand programmes are aired' (8% compared to 5% in 2005).
- After prompting, the majority of people consider the main functions of NZ On Air are to 'fund New Zealand made TV programmes' (86%), to 'provide a wider range of NZ television than would otherwise be available' (78%), and to 'promote New Zealand culture and identity' (75%). In 2006, significantly fewer people consider the functions of NZ On Air to be to 'promote New Zealand culture and identity' (75%, down from 80% in 2005), to 'promote Māori language and culture on television and radio (69%, down from 75% in 2005), to 'ensure programmes are made for special interest groups such as ethnic minorities and people with disabilities (65%, down from 70% in 2005) and to 'fund National Radio and Concert FM (49%, down from 56% in 2005).
- In 2006, almost half of those surveyed think that NZ On Air is part of TVNZ (43%, compared to 44% in 2005). Fewer people in 2006 consider NZ On Air to be a part of Radio NZ (38%, compared to 43% in 2005).

Attitudes towards NZ On Air and Local Content

- A high proportion of people agree that NZ On Air supports programmes and activities that are important to New Zealanders (79%). Substantial proportions also agree that 'seeing ourselves on television and hearing our stories helps to develop our cultural identity' (76%) and that 'without NZ On Air, New Zealand drama, documentary and children's programmes would disappear' (76%). Compared to 2005 there was a significant increase in the number of respondents who agree that 'it is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the internet (53%, compared to 46% in 2005).
- Just over two thirds (69%) of people agree that NZ On Air provides good quality and interesting programmes and services. This is a significant decrease on 2005 where 75 percent agreed with this statement.

Use of NZ On Air Funding

- A quarter (25%) of all respondents believe NZ On Air helps to buy TV programmes made overseas. This is a significant decrease on 2005 (31%), and sees a return to levels seen during the period 1999 to 2004. Conversely, two fifths (41%) believe that NZ On Air does not help buy overseas made TV programmes.
- Again, as observed in previous years, *Shortland Street* remains the programme most likely to be perceived to be funded by NZ On Air (27%, compared to 25% 2005). Among programmes that NZ On Air does currently fund, *Country Calendar* is the most likely to be spontaneously reported (11%, a significant increase from 8% in 2005). Next most frequently reported were:
 - What Now? (5%)
 - National Radio (5%)
 - Mai Time (4%)
 - Tagata Pasifika (4%).
- When asked to name programmes believed to be funded by NZ On Air, nine percent reported only programmes currently funded (similar to 8% in 2005). A further 24% (a significant decrease from 33% in 2005) reported programmes both currently funded and other programmes (e.g. past or never funded). Two fifths (42%) could not name any programmes, while 26 percent named only programmes not currently funded by NZ On Air.
- Consistent with previous years, people mainly identify programmes as funded by NZ On Air by the logo at the end of the programme (63%, compared to 67% in 2005). Comparatively fewer people identify a programme as funded by NZ On Air by the logo at the beginning of the programme (12%) and the quality of the programme (4%).

- A high proportion of the sample consider it important ('very important' or 'important') that NZ On Air funds the following:
 - Teletext subtitles on television programmes (80%)
 - New Zealand children's programmes on TV (76%)
 - Programmes for people with disabilities (77%)
 - In-depth documentaries on TV (77%)
 - New Zealand music (75%).
- There is comparatively lower support for programmes for minorities (52%) and Access radio stations (46%).
- Consistent with previous years, documentaries/discovery programmes remain the most preferred type of New Zealand made programme funded by NZ On Air, if additional funding was available (11%, identical to 2005). Compared to 2005 there were no significant differences between any of the types of programmes mentioned.

New Zealand Television

- Similar to 2005 (15%), 16 percent of respondents correctly reported that between 26 and 34 percent of television programmes are New Zealand made. Half (49%) underestimated the amount of New Zealand made television programmes, while almost one fifth (18%) overestimated the amount.
- Once told that around 33% of programmes screened between 6am and midnight are New Zealand made, just over half (53%) reported that the amount of New Zealand local television content should increase (identical to 2005). Similar to 2005, just four percent consider that the amount of local content should decrease, while two fifths (39%) consider that it should stay the same.
- However, when told that the proportion of local content in Australia is around 55 percent, over 75 percent in England, and over 90 percent in the United States, significantly more people then said that the amount of New Zealand local content should be increased (61%, compared to 53% initially recorded).
- The majority of people agree that free-to-air television should be required to screen a set amount of New Zealand made programmes, in particular documentaries (88%; 86% in 2005), children and young persons' programmes (84%; 85% in 2005), New Zealand made programmes (82%; 83% in 2005), and special interest programmes (83%; 82% in 2005).
- Once told of the expense of buying never seen before New Zealand programmes, compared to buying ready made overseas programmes, fewer people (78%) consider that free-to-air television should be made to screen a set amount of New Zealand made programmes (compared to 82% before being told of the expense comparison).

Television Viewing and Radio Listening Behaviour

- Over half the respondents (52%) believe the amount of New Zealand music being played on the radio has increased (but significantly lower than the 57% observed in 2005). Just four percent said they think it has decreased.
- Two thirds (64%) consider it important that radio stations are encouraged to play more New Zealand music and that more New Zealand music is played on the radio. This finding is similar to 2005.
- New Zealand documentaries continue to be reported as the most frequently watched programmes in New Zealand households (84% - a significant decrease from 90% in 2005).

The next most watched include:

- Special interest programmes (66%, a significant decrease from 71% in 2005)
- Drama programmes (62%, similar to 64% in 2005)
- Comedy programmes (62%, similar to 64% in 2005)
- New Zealand arts and performance programmes (55%, similar to 58% in 2005).
- From a comprehensive list of NZ On Air funded programmes, the most watched programme is Country Calendar (78%, compared to 75% in 2005), followed by What Now? (63% compared to 59% in 2005).
- 'One off' programmes, although watched by relatively fewer viewers, offered a high level of enjoyment. For example:
 - World of Wearable Arts (enjoyed by 69%, watched by 48%)
 - ANZAC Day Wreathlaying Ceremony (enjoyed by 82%, watched by 41%).
- Without regard to actual viewer numbers, programmes most enjoyed in 2006 were:
 - Country Calendar (enjoyed by 82%, watched by 78%)
 - The Unauthorised History of New Zealand (enjoyed by 80%, watched by 41%)
 - Extraordinary Kiwis (enjoyed by 80%, watched by 36%)
 - Bro' Town (enjoyed by 76%, watched by 49%).

Digital Television

- Currently 97 percent of respondents receive TV One, Two and Three, and these channels are deemed to have reception of a high quality (80%, 89% and 87% respectively). SKY Digital recorded the highest reception quality with 93 percent of respondents rating it as good or above.
- When informed that a range of channels similar to SKY could be available free if a set top box was purchased, half (49%) of New Zealanders would be willing to buy a set top box. This is a significant decrease on 2005 where nearly three quarters (73%) indicated they would be prepared to purchase a set top box. Conversely, two fifths (41%, compared to 21% in 2005) said that they would not.
- Among those willing to buy a set top box, 63 percent would not be prepared to pay over \$250. Twenty six percent did not know how much they were prepared to pay.
- If given the choice of which type of digital service (if any) they would like to receive, 51 percent stated that they would prefer free-to-air digital television, and 30 percent indicated that would prefer both free-to-air and pay digital television.
- The most popular reasons for the respondents' choices were 'more variety of channels' (24%), 'it's free' (21%), 'better reception' (7%), 'not willing to pay/shouldn't have to pay for television' (6%), 'it would be cheaper' (5%) and 'no monthly payments' (5%).
- Respondents identified the following factors as having the most influence on their decision. Reception quality (84%), overall cost (83%) and access to a wider choice of channels (83%) were deemed to have the largest influence, and access to live sports channels (61%) having the least influence.

1.3 Māori and Non- Māori Comparisons

This section summarises the significant differences between the Māori sample and the non-Māori sample.

- Māori respondents were significantly more likely to:

	Māori people	Non-Māori people
	%	%
Spontaneously recall that NZ On Air promotes New Zealand made programmes	13	9
Think that NZ On Air is a part of TVNZ	60	41
Think that NZ On Air is a part of Radio New Zealand	46	37
Be aware (prompted) that NZ On Air has the following functions:		
- To promote Māori language and culture on TV and radio	80	68
- To help fund radio stations for the Pacific Island Community in New Zealand	48	41
- To ensure programmes are made for special interest groups such as ethnic minorities and people with disabilities	72	65
- To provide Teletext subtitling on some TV programmes for people who have difficulty hearing	55	48
- To help fund Access radio stations	42	35
Agree with the following statements:		
- Seeing ourselves on television and hearing our stories helps to develop our cultural identity	83	76
- It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet	60	51
- Without NZ On Air National Radio and Concert FM programmes would disappear	60	53
Agree that NZ On Air provides good quality and interesting programmes and services	80	68
Consider that NZ On Air helps buy television programmes made overseas	32	24
Be aware of both currently funded NZ On Air and other programmes	38	22
Be aware that a programme is funded by NZ On Air by the logo at the end of the programme	72	62

	Māori people %	Non- Māori people %
Think NZ On Air should fund:		
- Programmes for ethnic minorities	77	56
- Pacific Island Radio station in New Zealand	71	50
- New Zealand children's programmes on TV	80	76
- New Zealand music	85	73
- Programmes for people with disabilities	87	75
- Children's programmes reflecting Māori language and culture for all children	83	64
- New Zealand comedy programmes	71	65
- In-depth and well researched NZ documentaries on TV	84	77
- Māori radio and television in English	70	60
- New Zealand arts and performance programmes	72	66
- Documentaries made by Māori about Māori issues, but for a general audience	85	63
- Access radio stations	56	45
- Māori radio and television partly in Te Reo	80	53
- Programmes for minorities	68	49
Support an increase in the amount of New Zealand local content on television	69	51
Support an increase in the amount of New Zealand local content on television after being informed of the amount of local content in other countries	75	60
Agree that free-to-air channels should be required to screen a set amount of New Zealand programmes:		
- New Zealand made documentaries	93	87
- New Zealand made programmes	89	83
- New Zealand made children and young persons' programmes	89	83
- New Zealand made special interest programmes	91	83
- New Zealand made comedy programmes	82	69
- New Zealand made arts and performance programmes	84	72
- New Zealand made drama programmes	86	76

	Māori people	Non- Māori people
	%	%
Think there should be compulsory screening of New Zealand programmes, even after being told of the expense	88	77
Believe that the amount of New Zealand music on the radio has increased over the last 12 months	60	51
Agree that Radio stations should be encouraged to play more New Zealand music on the radio	72	63
Believe that it is important that radio stations actually play more New Zealand music on the radio	76	61
Say that people in their household regularly listen to or watch a wide range of programmes (compared to non-Māori people):		
- New Zealand television documentary programmes made with the help of NZ On Air	90	84
- Pacific Island radio stations	34	9
- New Zealand children's programmes	70	43
- New Zealand comedy programmes	75	60
- New Zealand special interest programmes	79	65
- NZ On Air funded music videos	68	44
- New Zealand arts and performance programmes	68	53
- New Zealand drama programmes	72	61
- Māori radio stations and TV programmes in English	75	28
- Teletext subtitles on television programmes	35	23
- Access radio stations	27	25
- New Zealand programmes on commercial radio stations	41	31
- New Zealand music programmes on commercial radio	44	33
- Māori radio stations and TV programmes in Te Reo	65	13
Currently receive:		
- Māori Television	86	65
- Trackside	67	53
- SKY Digital	48	38
Willing to purchase a set top box	58	48

1.4 Conclusions

Overall awareness remains very high, with nine in ten New Zealanders aware of NZ On Air.

In 2006 New Zealanders continued to express positive opinions of NZ On Air with over three quarters agreeing that NZ On Air supports programmes and activities important to New Zealanders. In addition to this, over two thirds agreed that NZ On Air provides good quality and interesting programmes and services.

While many New Zealanders are aware that NZ On Air funds programmes, few are able to spontaneously (and accurately) name programmes currently funded. A very small fraction could identify programmes funded by NZ On Air when asked, and two thirds of the sample could not name any programmes funded by NZ On Air. The logo that appears at the end of the programme remains by far the most common way of identifying that a programme had been funded by NZ On Air.

In 2006, there is continued support for NZ On Air to fund subtitled programmes, children's programmes, programmes for people with disabilities, in-depth documentaries (and importantly, documentaries about New Zealand), and New Zealand music.

Very few respondents could accurately identify the current level of New Zealand made programmes on television. However, when told of the levels of locally made programmes overseas, half of the respondents thought the current level should increase.

There is also strong support for set quotas of New Zealand made programmes to be screened – in particular documentaries, children and young persons' programmes and special interest programmes. There is similar support for radio stations to be encouraged to play more New Zealand music.

A range of NZ On Air funded programmes is both watched and enjoyed by a high proportion of New Zealanders. However, since 2005 there have been significant decreases in viewer audiences for programmes such as documentaries, special interest, and children's programmes. Country Calendar and What Now? are currently the most watched programmes, with Country Calendar also leading in the enjoyment ratings.

Support for purchasing a set top box that would enable access to a range of free-to-air channels has significantly decreased in 2006 with just under half the respondents willing to buy a set top box. Most would only be willing to pay less than \$250 for this service.

Similar to 2004, a range of significant differences are evident in the viewing behaviour, preferences and opinions of Māori people compared to non-Māori people. Notably, there is a higher degree of support among Māori people for funding programmes for ethnic minorities, Pacific Island radio stations, and New Zealand music and children's programmes.

Māori people are also significantly more likely to support an increase in the amount of locally made content and agree that free-to-air channels should be required to screen a set amount of New Zealand programmes, in particular children and young persons', comedy, and arts and performance programmes.

Māori people are significantly more likely to watch and listen to a wide range of programme types, in particular Māori radio in both English and te reo, children's, comedy and special interest programmes, and NZ On Air funded music videos.

2.0 Background

TNS¹ New Zealand has conducted a public information and opinion monitor for NZ On Air since 1992. Objectives of the research are to:

- Measure awareness of NZ On Air.
- Determine the level of understanding of the role and functions of NZ On Air.
- Determine awareness of how NZ On Air funding is used.
- Obtain feedback on the percentage of 'local' New Zealand made programmes that should be on television.
- Measure support for compulsory broadcasting of New Zealand made programmes on free-to-air television.
- Gather feedback on the importance of the role NZ On Air plays in New Zealand broadcasting
- Obtain feedback on the preferred use of NZ On Air funding.
- Gather feedback on the use of any extra funding made available.
- Measure popularity and awareness of programmes funded by NZ On Air.
- Identify any differences between the responses of Māori people and non-Māori people.
- Measure television viewing and radio listening behaviours.
- Determine the level of support for NZ On Air's programmes and services.
- Measure perceived attitudes and behaviour regarding digital television.

From 1999 all reference to the Broadcasting Fee was removed. Where applicable, respondents are asked about NZ On Air instead of the Fee.

¹ Formerly NFO New Zealand/ CM Research.

3.0 Methodology

The main sample of n=770 respondents was recruited using random digit dialling. The margin of error associated with a sample of n=770 is ± 3.5 percent. On reduced base sizes the sample error will be greater than this.

In addition, a booster sample of n=220 Māori people were randomly drawn from the Māori Electoral Roll². Comparisons between Māori people and non-Māori people are made throughout the report. Additional to the booster sample of n=220 Māori people, a further n=72 Māori people were interviewed as part of the main sample. This gave a total of n=292 Māori people, with the remaining n=698 interviews³ being classified as non-Māori people.

Sample

- The person interviewed was the person within each household who was aged 18 years or over.
- The main sample was geographically representative of the main urban, secondary urban and rural centres (100% national coverage). From 1997 the sample was extended to include rural households.
- The sample profile is appended. As occurred in previous years, females (60%) were more likely than males (40%) to participate in the survey.

Interviewing

- Fully trained TNS interviewers, based in Auckland, carried out the interviewing. This survey was conducted using Computer Assisted Telephone Interviewing (CATI).
- Up to three call backs were conducted to reduce over-sampling of less socially active people.
- To ensure the quality of information, all interviewers' work was checked for accuracy and completeness by a supervisor. Additionally, a 10 percent audit of each interviewer's work was undertaken.
- Fieldwork was conducted between 7 June and 7 July 2006. All interviewing was conducted during weekends and weekday evenings.
- A structured questionnaire was used for the survey. The questionnaire is appended to this report.

Significant Differences

Significant differences are highlighted throughout the report. This includes:

- Significant differences are marked in tables throughout the report. On the general sample tables (n=770 in 2006), a  indicates a significantly higher result compared with 2005. A  indicates a significantly lower result compared with 2005.

² Nine and a half thousand names were telematched to give a total sample frame of 2886 of which n=220 Māori were interviewed.

³ n=990 less the n=292 Māori people

- On the Māori tables, a  indicates a significantly higher result compared with non-Māori people in 2006; while a  indicates a significantly lower result compared with non-Māori people in 2006. Significant differences are reported only where they are evident.
- Significant differences by demographic group are highlighted in a red box where they are evident. For example, the table below shows that people who reside in the Wellington Metropolitan area, those who are male, and those who are aged between 35 and 44 years are significantly more likely to be aware of NZ On Air.

Aware of NZ On Air:	Significantly more likely to:
Yes	<ul style="list-style-type: none"> – reside in Wellington Metro – be male – aged 35 to 44 years

- Throughout the report zero figures will be indicated with a dash (-) and figures greater than zero but less than one percent will be shown with an asterix (*).

Questionnaire

A copy of the questionnaire is appended to this report (see appendix two).

4.0

Awareness of NZ On Air

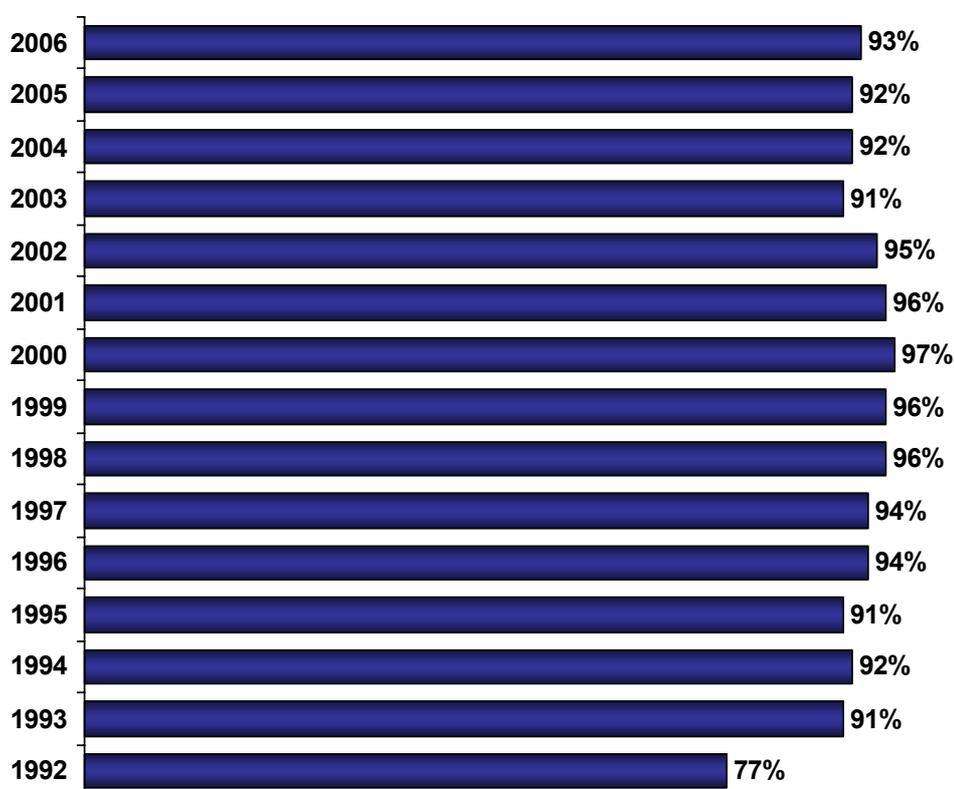
4.0 Awareness of NZ On Air

4.1 Prompted Awareness of the Organisation

New Zealanders were asked whether they have heard of an organisation called NZ On Air.

The level of prompted awareness has remained stable since 2003. In 2006, just over nine out of ten New Zealanders (93%) are aware of NZ On Air.

Prompted Awareness of NZ On Air



Base: All respondents (n=770)

Aware of NZ On Air	Significantly more likely:
	<ul style="list-style-type: none"> – European – Aged 45 to 54 years – Older couple/ single person

Prompted Awareness of NZ On Air – Results of Māori People Compared with Non-Māori People

The table below compares awareness of NZ On Air among Māori and non-Māori people. Both Māori (92%) and non-Māori (93%) have high levels of awareness of NZ On Air with no significant difference between the groups.

Prompted Awareness of NZ On Air

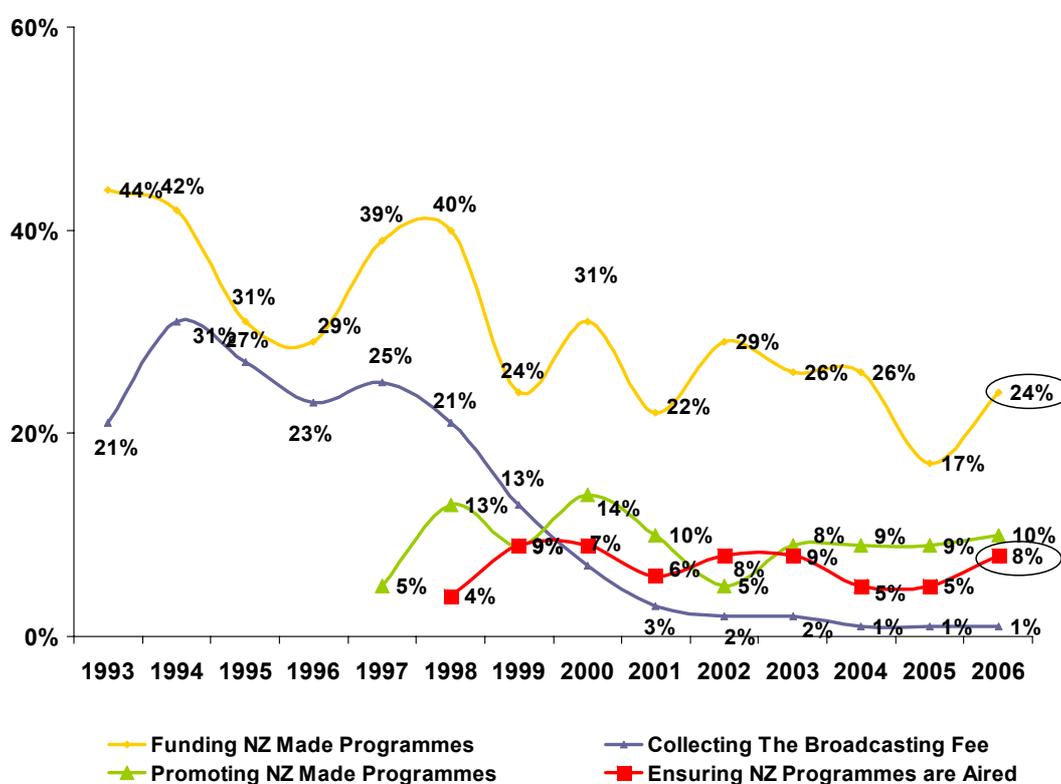
	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Yes	94	93	92	93
No	6	7	8	7
Don't know	-	-	-	-
Base:	271	254	292	698

4.2 Spontaneous Understanding of NZ On Air

Those aware of NZ On Air (n= 714) were asked what they understood the functions of NZ On Air to be.

The chart below plots four responses (tracked from 1993 to 2006). Funding New Zealand made programmes is consistently understood to be the key function of NZ On Air, which has significantly increased from 17 percent in 2005 to 24 percent in 2006. Ensuring New Zealand programmes are aired also significantly increased from five percent in 2005 to eight percent in 2006.

Spontaneous Understanding of NZ On Air's Functions



Base: Aware of NZ On Air (n=714)

Spontaneous Understanding of NZ On Air's Functions

A full list of NZ On Air's functions spontaneously mentioned by people is shown in the table below.

As in previous years, the most commonly recalled function of NZ On Air is considered to be funding New Zealand made programmes (24%), a significant increase from 17 percent observed in 2005 but closer to levels in the preceding three years.

Significantly more people in 2006 (compared to 2005) consider NZ On Air's functions to include radio and television broadcasting (1% in 2005 increasing to 15% in 2006), funding programmes for television and radio (4% in 2005 increasing to 8% in 2006), and ensuring New Zealand programmes are aired (5% in 2005 increasing to 8% in 2006).

Spontaneous Understanding of NZ On Air

	2002 %	2003 %	2004 %	2005 %	2006 %
Funding New Zealand made programmes	29	26	26	17	24
Promoting New Zealand made programmes	5	9	9	9	10
Policing, censorship and maintaining standards	7	7	8	8	9
Funding programmes for TV and radio	7	4	6	4	8
Funding broadcasting	6	12	6	2	1
Ensuring New Zealand programmes are aired	8	8	5	5	8
Quality TV coverage	-	-	-	5	2
Making TV and radio programmes	6	1	1	5	4
Supervising/Policing Commercial Broadcasting	-	-	-	4	-
Government department for broadcasting	-	-	4	4	2
Funding TV programmes	3	4	2	4	-
Radio/TV news service	1	2	1	3	2
To Encourage local talent	-	-	-	2	2
To Provide a service to NZ Customers	-	-	-	2	1
Making TV programmes	2	4	1	2	*
Provide entertainment	2	1	1	2	1
Documentaries	-	-	-	1	1
Radio and TV broadcasting	-	-	5	1	15
To inform/educate people	2	2	2	1	3
Running TV	2	2	1	1	1
Collecting the Broadcasting Fee	2	2	1	1	1
Support New Zealand culture	2	1	1	1	1
Funding National Radio	1	1	1	1	1
Advertising	1	*	-	1	1
Service to New Zealand customers	*	1	1	-	1
Māori programmes	1	1	1	-	1

Spontaneous Understanding of NZ On Air (Continued)

	2002 %	2003 %	2004 %	2005 %	2006 %
Making radio programmes	1	1	-	-	*
Distributing licence fee	*	*	-	-	-
Funding orchestra, opera and the arts	-	1	-	-	-
Funding radio programmes	1	*	2	-	*
Delivering top quality programmes	2	3	2	-	-
Other	2	4	3	-	1
Don't know	17	16	18	19	14
Base: Aware of NZ On Air	714	684	693	716	714

Spontaneously stated function of NZ On Air	Significantly more likely:
Funding NZ made programmes	- Aged 45 to 54 years
Fund programmes for TV and radio	- Male
Policing/censorship of programmes	- NZ European

Spontaneous Understanding of NZ On Air – Results of Māori People Compared with Non-Māori People

The table below shows that Māori people are significantly more likely than non-Māori people to associate NZ On Air with promoting New Zealand made programmes (13%, compared to 9% of non-Māori respondents).

Māori people are significantly less likely than non-Māori people to associate NZ On Air with funding New Zealand made programmes (19%, compared to 25% of non-Māori respondents).

Spontaneous Understanding of NZ On Air

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Promoting New Zealand made programmes	8	7	13	9
Funding New Zealand made programmes	19	19	19	25
Radio and TV broadcasting	-	10	17	15
Policing, censorship and maintaining standards	5	7	7	10
Funding broadcasting	6	5	1	1
Making TV and radio programmes	5	1	3	4
Radio/TV news service	1	3	3	2
Funding TV programmes	2	2	-	*
Ensuring New Zealand programmes are aired	9	5	5	8
Making TV programmes	*	1	*	*
Service to New Zealand customers	1	1	2	1
Running TV	4	3	1	1
To inform /educate people	*	3	3	3
Māori programmes	2	-	1	*
Support New Zealand Culture	1	*	-	-
Other	2	2	-	*
Don't know	31	26	18	13
Base: Aware of NZ On Air	254	215	268	650

4.3 Is NZ On Air Part of TVNZ?

As observed in previous years, there continues to be a lack of clarity about the relationship between NZ On Air and TVNZ.

When asked if NZ On Air is part of TVNZ, almost half of those surveyed (43%) think that NZ On Air is part of TVNZ.

Is NZ On Air Part of TVNZ?

	2000 %	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
Yes	39	42	40	46	46	44	43
No	45	43	43	39	40	40	41
Don't know	16	15	17	15	14	16	16
Base:	750	750	751	750	751	778	770

	Significantly more likely:
Consider NZ On Air part of TVNZ	<ul style="list-style-type: none"> – female – Māori – Live in both secondary and minor urban areas.

Is NZ On Air Part of TVNZ – Results of Māori People Compared with Non-Māori People

Māori people were significantly more likely to consider that NZ On Air is part of TVNZ (60%) compared to non-Māori people (41%). Since 2002 there has been little change in the percentage of Māori that believe NZ On Air is a part of TVNZ.

Is NZ On Air Part of TVNZ?

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Yes	59	59	60	41
No	30	25	28	42
Don't know	11	15	12	17
Base:	271	254	282	698

4.4 Is NZ On Air Part of Radio New Zealand?

Just under two fifths of people (38%) consider that NZ On Air is part of Radio New Zealand. This is a significant decrease on 2005, where 43 percent considered NZ On Air to be a part of Radio New Zealand compared to 38 percent in 2006.

Is NZ On Air Part of Radio New Zealand?

	2002 %	2003 %	2004 %	2005 %	2006 %
Yes	38	44	40	43	38
No	44	41	39	42	44
Don't know	17	15	20	16	18
Base:	751	750	751	778	770

	Significantly more likely:
Consider NZ On Air is part of Radio New Zealand	<ul style="list-style-type: none"> – Aged 55+ – Live in both secondary and minor urban areas.

Is NZ On Air Part of Radio New Zealand? - Results of Māori People Compared with Non-Māori People

Māori people (46%) were significantly more likely than non-Māori (37%) people to consider that NZ On Air is part of Radio New Zealand. Since 2002 there has been little change in the percentage of Māori that believe NZ On Air is a part of Radio New Zealand.

Is NZ On Air Part of Radio New Zealand?

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Yes	45	48	46	37
No	38	30	36	46
Don't know	17	21	19	17
Base:	271	254	292	698

4.5 Prompted Awareness of NZ On Air Functions

Respondents were read a list of NZ On Air functions and asked whether they were aware that NZ On Air has these functions.

The table overleaf shows the percentage of people aware of NZ On Air's functions.

Consistent with 2005, the most well known function of NZ On Air (after prompting) is to fund New Zealand made television programmes (86%). To provide a wider range of New Zealand TV, such as drama and documentary and radio programmes than would otherwise be available (78%) and to promote New Zealand culture and identity (75%) round out the top three prompted functions of NZ On Air. As seen in 2005, only two fifths of people (36%) are aware that NZ On Air helps fund Access radio stations.

Compared to 2005, significantly fewer people are aware that NZ On Air:

- Promotes New Zealand culture and identity (75%, compared to 80% in 2005)
- Promotes Māori language and culture on television and radio (69%, compared to 75% in 2005)
- Ensures programmes are made for special interest groups like ethnic minorities and people with disabilities (65%, compared to 70% in 2005)
- Funds National Radio and Concert FM (49%, compared to 56% in 2005).

Prompted Awareness of NZ On Air Functions

	1998	1999	2000	2001	2002	2003	2004	2005	2006
	%	%	%	%	%	%	%	%	%
To fund New Zealand made TV programmes	93	90	93	91	90	89	88	87	86
To promote New Zealand culture and identity	74	83	79	82	81	80	83	80	75
To provide a wider range of New Zealand TV, such as drama and documentary and radio programmes than would otherwise be available	82	79	87	83	77	78	78	78	78
To promote Māori language and culture on television and radio	74	81	76	80	77	78	78	75	69
To promote New Zealand music, for example, by funding New Zealand music videos	52	59	60	62	68	69	81	71	70
To ensure programmes are made for special interest groups like ethnic minorities and people with disabilities	63	68	63	69	65	67	67	70	65
To archive broadcasting material and historic programmes	56	63	54	52	59	62	64	61	63
To fund National Radio and Concert FM	68	67	62	59	53	53	55	56	49
To provide Teletext subtitling on some TV programmes for people who have difficulty hearing	47	44	41	40	44	48	47	51	49
To help fund radio stations for the Pacific Island Community in New Zealand	-	-	-	40	40	44	42	45	42
To help fund Access radio stations	36	46	38	38	37	39	39	39	36
To help fund regional television stations ⁴	-	-	-	-	-	-	-	-	61
Base:	1000	750	750	750	751	750	751	778	770

⁴ First asked in 2006

Awareness of specific NZ On Air Functions	Significantly more likely to be:
To provide a wider range of New Zealand TV and radio programmes than would otherwise be available	<ul style="list-style-type: none"> - European - Aged 45 to 54 years - Aware of NZ On Air
To fund New Zealand made programmes	<ul style="list-style-type: none"> - European - Aged 45 to 54 years - Aware of NZ On Air
To fund National Radio and Concert FM	<ul style="list-style-type: none"> - Aged 55+ - Older couple/single - Christchurch Provincial - Aware of NZ On Air
To promote Māori language and culture on TV and radio	<ul style="list-style-type: none"> - Aware of NZ On Air - Māori
To promote New Zealand culture and identity	<ul style="list-style-type: none"> - Aged 18 to 34 years - Aware of NZ On Air
To ensure programmes are made for special interest groups like ethnic minorities and people with disabilities	<ul style="list-style-type: none"> - Aware of NZ On Air
To archive broadcasting material and historic programmes	<ul style="list-style-type: none"> - Aged 55+ - Older couple/single - Aware of NZ On Air - European
To promote New Zealand music, for example, by funding New Zealand music videos	<ul style="list-style-type: none"> - Aged 18 to 34 years - Young/single/couple/group household - Aware of NZ On Air
To help fund Access radio stations	<ul style="list-style-type: none"> - Male
To provide Teletext subtitling on some TV programmes for people who have difficulty hearing	<ul style="list-style-type: none"> - Christchurch Provincial - Aware of NZ On Air - Young family
To help fund radio stations for Pacific Island Communities in New Zealand	<ul style="list-style-type: none"> - Aged 55+ - Māori

Prompted Awareness of NZ On Air Functions - Results of Māori people Compared with Non-Māori people

Māori people were significantly more likely than Non-Māori people to be aware (after prompting) that NZ On Air:

- Promotes Māori language and culture on television and radio (80% for Māori compared to 68% for non-Māori).
- Helps fund radio stations for the Pacific Island community in New Zealand (48% for Māori compared to 41% for non-Māori).
- To ensure programmes are made for special interest groups (72% for Māori compared to 65% for non-Māori).
- To provide Teletext subtitling on some TV programmes (55% for Māori compared to 48% for non-Māori).
- Helps fund Access radio stations (42% for Māori compared to 35% for non-Māori).

Prompted Awareness of NZ On Air Functions

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
To fund New Zealand made TV programmes	87	85	85	87
To promote Māori language and culture on TV and radio	80	82	80	68
To promote New Zealand culture and identity	80	78	78	75
To promote New Zealand music, for example, by funding New Zealand music videos	76	78	75	69
To provide a wider range of New Zealand TV, such as drama and documentary and radio programmes than would otherwise be the case	75	72	76	79
To help fund radio stations for the Pacific Island Community in New Zealand	49	50	48	41
To ensure programmes are made for special interest groups like ethnic minorities and people with disabilities	68	65	72	65
To archive broadcasting material and historic programmes	62	68	64	64

Prompted Awareness of NZ On Air Functions (continued)

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
To provide Teletext subtitling on some TV programmes for people who have difficulty hearing	53	57	55	48
To fund National Radio and Concert FM	54	48	45	49
To help fund Access radio stations	43	39	42	35
To help fund programmes on Regional Television stations ⁵	-	-	62	61
Base:	271	254	292	698

⁵ Not asked in 2002 or 2004.

4.6 Attitudes Towards NZ On Air and Local Content

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

As in previous years, a high proportion of people agree that 'NZ On Air supports programmes and activities that are important to New Zealanders' (79%), 'seeing ourselves on television and hearing our stories helps to develop our cultural identity' (76%) and 'Without NZ On Air New Zealand drama, documentary and children's programmes would disappear' (76%).

Compared to 2005 there has been a positive shift in opinions with a significant increase in the level of agreement with the statement 'It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet' (53% in 2006 compared to 46% in 2005).

In addition there have also been significant decreases in the level of disagreement with the following statements:

- NZ On Air supports programmes and activities that are important to New Zealanders (6%, compared to 9% in 2005)
- Seeing ourselves on television and hearing our stories helps to develop our cultural identity (7%, compared to 11% in 2005)
- Without NZ On Air New Zealand drama, documentary and children's programmes would disappear (7%, compared to 12% in 2005)
- NZ On Air does provide programmes and activities that I enjoy (7%, compared to 11% in 2005).

Attitudes Towards NZ On Air and Local Content

	2002		2003		2004		2005		2006	
	Agree %	Disagree %								
NZ On Air supports programmes and activities that are important to New Zealanders	77	6	80	7	79	8	77	9	79	6
Seeing ourselves on television and hearing our stories helps to develop our cultural identity	77	8	78	8	77	10	76	11	76	7
Without NZ On Air New Zealand drama, documentary and children's programmes would disappear	78	7	76	10	73	12	73	12	76	7
Without NZ On Air a lot of New Zealand writing, production and acting talent would disappear	74	9	73	11	72	12	71	12	73	10
NZ On Air does provide programmes and activities that I enjoy	70	9	73	9	70	10	70	11	70	7
Without NZ On Air National Radio and Concert FM programmes would disappear	57	11	56	14	51	18	56	15	53	15
It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet	50	20	49	21	48	24	46	21	53	19
NZ On Air only supports programmes and activities that do not interest me	18	59	15	62	19	59	17	60	15	62
Without NZ On Air a lot of NZ arts and performance programmes would disappear ⁶	-	-	74	9	-	-	-	-	-	-
Base:	751		750		751		778		770	

⁶ This statement was only asked in 2003.

Attitude towards NZ On Air and Local Content	Significantly more likely to be:
Without NZ On Air a lot of New Zealand drama, documentary and children's programmes would disappear	<ul style="list-style-type: none"> - Female - Aged 45 to 54 years - Aware of NZ On Air - European
NZ On Air only supports programmes and activities that do not interest me	<ul style="list-style-type: none"> - Aged 55+ - Older couple/ single household
Without NZ On Air a lot of NZ writing, production and acting talent would disappear	<ul style="list-style-type: none"> - European - Aware of NZ On Air - Mature family household
Seeing ourselves on television and hearing our stories and songs helps to develop our cultural identity	<ul style="list-style-type: none"> - Young/single/couple/group household - Aware of NZ On Air - Christchurch Provincial - Aged 18 to 34 years
NZ On Air supports programmes and activities that are important to New Zealanders	<ul style="list-style-type: none"> - Aged 18 to 34 years - Aware of NZ On Air
It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet	<ul style="list-style-type: none"> - Female - Māori - Live in minor urban area
NZ On Air does provide programmes and activities that I enjoy	<ul style="list-style-type: none"> - Aged 18 to 34 years - Aware of NZ On Air

Attitudes Towards NZ On Air and Local Content – Results of Māori people Compared with Non-Māori people

Māori people were significantly more likely than non-Māori to agree with the following statements:

- Seeing ourselves on television and hearing our story helps to develop our cultural identity (83%, compared to 76% for non-Māori)
- It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet (60 %, compared to 51% for non-Māori)
- Without NZ On Air National Radio and Concert FM programmes would disappear (60%, compared to 53% for non-Māori).

Attitudes Towards NZ On Air and Local Content

Agree	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
NZ On Air supports programmes and activities that are important to New Zealanders	83	81	79	79
Seeing ourselves on television and hearing our stories helps to develop our cultural identity	87	85	83	76
NZ On Air does provide programmes and activities that I enjoy	79	78	73	70
Without NZ On Air a lot of New Zealand writing, production and acting talent would disappear	77	73	74	73
Without NZ On Air New Zealand drama, documentary and children's programmes would disappear	82	75	75	77
It is important that NZ On Air made programmes are shown on new broadcasting systems like pay TV, digital TV and the Internet	61	61	60	51
Without NZ On Air National Radio and Concert FM programmes would disappear	64	51	60	53
NZ On Air only supports programmes and activities that do not interest me	15	16	12	15
Base:	271	254	292	698

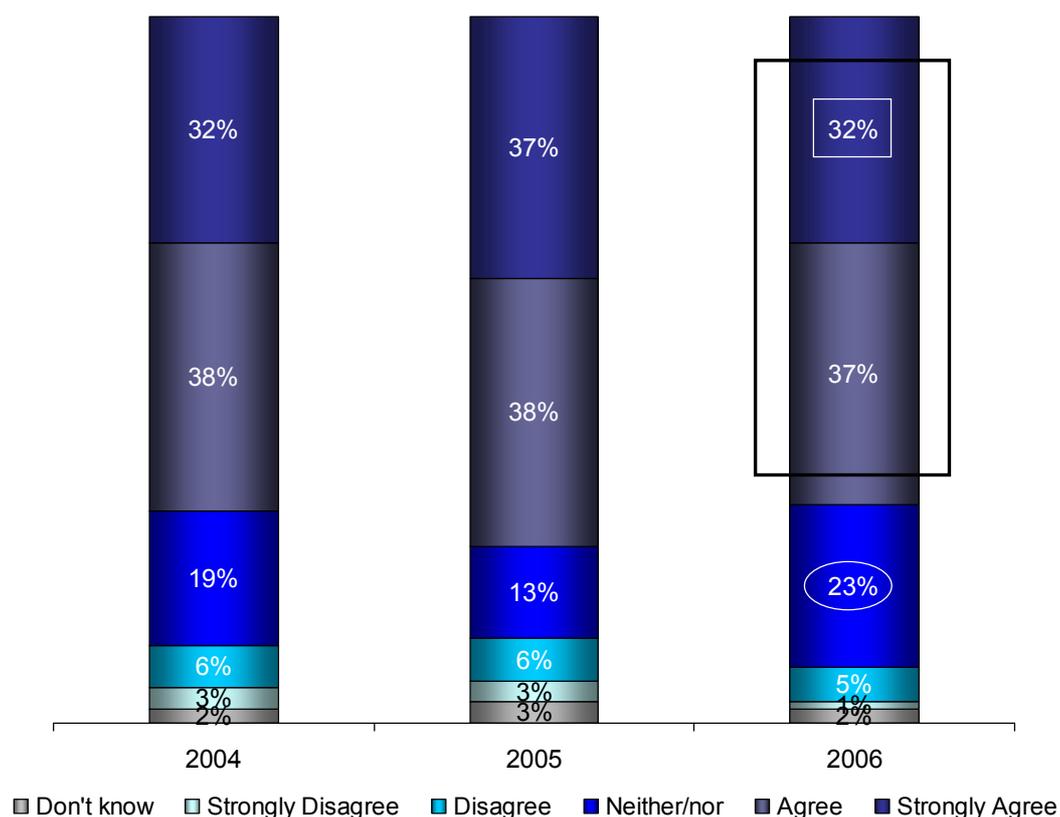
4.7 Quality of Programmes and Services Provided by NZ On Air

Sixty nine percent of all respondents agree that NZ On Air provides good quality and interesting programmes and services. This is a significant decrease on 2005 where 75 percent agreed that NZ On Air provides good quality and interesting programmes and services.

Within the group of respondents who did agree with the statement there was a significant decrease in the number who strongly agreed. In 2006, 32 percent of respondents strongly agreed compared to 37 percent in 2005.

There was a significant increase in the number of respondents who were impartial (13% in 2005 increasing to 23% in 2006) indicating that those who may have previously agreed are now undecided.

NZ On Air Does Provide Good Quality and Interesting Programmes and Services



Base: 2004:751, 2005:778, 2006:770

Quality of Programmes and Services Provided by NZ On Air – Results of Māori people Compared with Non-Māori people

Māori are significantly more likely than non-Māori to agree that NZ On Air provides good quality and interesting programmes and services (80% for Māori compared to 68% for non-Māori).

NZ On Air Does Provide Good Quality and Interesting Programmes and Services

	Māori people				Non-Māori people
	2001 %	2002 %	2004 %	2006 %	2006 %
NZ On Air provides good quality and interesting programmes and services	63	80	82	80	68
Base:	271	271	254	292	698

5.0

Use of NZ On Air Funding

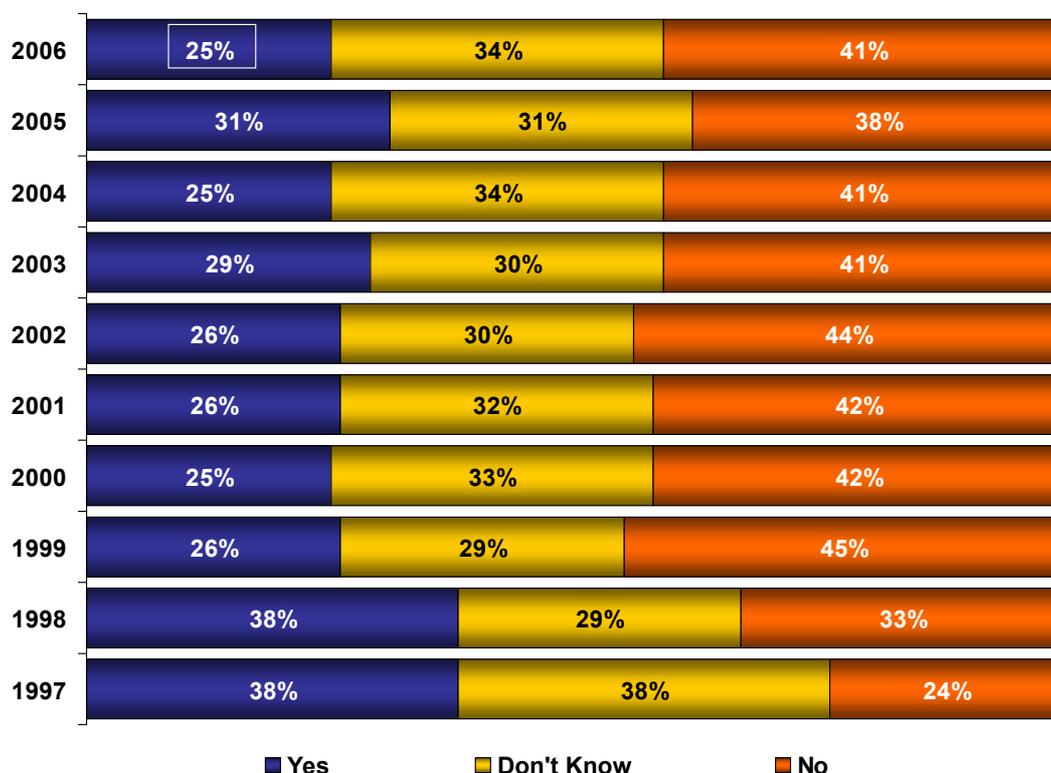
5.0 Use of NZ On Air Funding

5.1 Buying Programmes Made Overseas

Significantly fewer people in 2006 (25%) believe that NZ On Air helps buy television programmes made overseas compared with 2005 (31%). Conversely, two fifths (41%) reported that NZ On Air does not buy television programmes made overseas.

The results seen in 2006 are very similar to those seen during the period from 1999 thru to 2004.

Does NZ On Air Help to Buy TV Programmes Made Overseas?



Base: All respondents (n=770)

	Significantly more likely:
NZ On Air does not help to buy television programmes made overseas	<ul style="list-style-type: none"> - Male - Aged 18 to 34 years - European - Young/single/couple/group household - Live in an Urban area - Aware of NZ On Air

Buying Programmes Made Overseas - Results of Māori People Compared with Non-Māori People

Māori people (32%) were significantly more likely to consider that NZ On Air helps buy television programmes made overseas compared to non-Māori people (24%).

Does NZ On Air Help to Buy TV Programmes Made Overseas?

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Yes	36	30	32	24
No	34	34	32	43
Don't know	31	36	36	33
Base:	271	254	292	698

5.2 Programmes Funded by NZ On Air

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

It is important to note that changes over time may be due to what programmes were on air at the time of interviewing and may not accurately reflect changes in awareness. Interviewing was conducted in July 2006.

There was a significant increase in those respondents who recognised that Country Calendar was funded by NZ On Air (8% in 2005 increasing to 11% in 2006). Those who identified What Now? as funded by NZ On Air significantly decreased from 13 percent in 2005 to five percent in 2006.

Spontaneous Awareness of Programmes Funded by NZ On Air

	2002	2003	2004	2005	2006		2002	2003	2004	2005	2006
	%	%	%	%	%		%	%	%	%	%
Shortland Street ⁷	32	21	25	25	27	Praise Be	5	2	2	2	2
News (unspecified)	11	8	14	16	15	Sport (unspecified)	-	1	2	2	
What Now?	16	12	13	13	5	NZ Idol	-	-	6	1	1
Documentary NZ	9	4	5	11	3 ⁸	Holmes	2	3	3	1	1
Sticky TV	6	8	10	8	2 ⁹	The Insiders Guide To	-	-	3	1	-
Country Calendar	7	5	3	8	11	Number 8 Wired	3	-	2	1	*
National Radio	3	7	7	7	5	Serial Killers	-	-	2	-	*
20/20	4	4	7	5	5	Mercy Peak	13	5	6	-	*
Mai Time	6	5	6	5	4	Havoc & Newsboy	1	*	2	-	-
60 Minutes	4	3	5	5	2	My House My castle	-	-	2	-	1
Fair Go	3	3	5	4	5						
Tagata Pasifika	5	3	4	4	4						
Māori TV channel	-	-	4	3	2						
Asia Down Under	2	1	3	3	3						
Concert Programme	1	1	3	3	2						
Inside New Zealand	6	6	7	2	2						
Te Karere ¹⁰	5	4	4	2	3						
Good Morning	-	-	3	2	2						
Sunday	-	2	3	2	2						
Base:	751	750	751	778	770		751	750	751	778	770

⁷ Previously funded by NZ On Air.

⁸ A significant decrease however sample size is too small to report

⁹ A significant decrease however sample size is too small to report

¹⁰ Funded by Te Mangai Paho which until 1 July 2000 was funded directly by NZ On Air.

Programmes Funded by NZ On Air – Results of Māori People Compared with Non-Māori People

Māori people were significantly more likely than non-Māori people to consider that *Shortland St*, *What Now?*, *News (unspecified)*, and *Mai Time* are funded by NZ On Air.

Spontaneous Awareness of Programmes Funded by NZ On Air

	Māori people		Non-Māori people
	2004 %	2006 %	2006 %
Shortland Street	36	40	25
What Now?	19	9	5
Mai Time	17	13	3
News (unspecified)	15	21	15
Sticky TV	11	3	2
20/20	7	4	5
Māori TV channel	8	9	1
Tagata Pasifika	5	8	4
Documentary NZ	4	2	3
Inside New Zealand	11	4	2
Asia Down Under	5	3	3
NZ Idol	4	1	1
60 Minutes	4	3	2
Sport (unspecified)	2	3	2
Praise Be	3	-	2
Squirt	2	2	1
Te Karere	9	12	2
Marae¹⁷	7	4	-
Fair Go	2	2	5
The Edge	5	*	*
The Insiders Guide to	5	-	-
Pukana¹⁷	4	2	-
National Radio	3	3	5
Holmes	3	-	1
Country Calendar	4	8	11
Mataku	2	-	*
Mercy Peak	4	-	*
Number 8 Wired	4	1	-
Good Morning	4	3	2
Waka huia¹⁷	4	4	-
Sunday	2	2	2
Flipside	2	-	-
Inside Out	2	1	*
My House My Castle	2	2	1
Concert Programme	2	2	2
Mike King	2	-	-
Base:	254	292	698

Awareness of Programmes Currently Funded by NZ On Air¹¹

Spontaneously recalled programmes perceived to be funded by NZ On Air were grouped into 'current funded', 'past funded' and 'never funded'. In 2006, respondents appear to be increasingly unsure which programmes are funded by NZ On Air.

The number of respondents who identified programmes both currently funded by NZ On Air and other programmes funded previously or never funded at all significantly decreased in 2006 (24%, compared to 33% in 2005). This decrease is mirrored by a significant increase in the None/Don't know responses (36% in 2005 increasing to 42% in 2006).

The table below shows the extent to which respondents were able to accurately name NZ On Air programmes.

Awareness of Programmes Currently Funded by NZ On Air

	2002 %	2003 %	2004 %	2005 %	2006 %
Named only currently funded NZ On Air programmes	15	15	13	8	9
Named both currently funded NZ On Air and other programmes (e.g. past or never funded)	30	25	30	33	24
Named only programmes not currently funded by NZ On Air	12	9	14	22	26
None/Don't know	42	51	42	36	42
Base:	751	750	751	778	770

Programmes funded by NZ On Air	Significantly more likely:
Named both currently funded NZ On Air and other programmes (e.g. past or never funded)	- Aged 18 to 34 years - Aware of NZ On Air
Named only programmes not currently funded by NZ On Air	- Young family
None/Don't know	- Aged 55+ - Not aware of NZ On Air

¹¹From 2005 'current funded' included fully and partially funded programmes. In previous years, 'currently funded' included only fully funded programmes.

Awareness of Programmes Funded by NZ On Air – Results of Māori Compared with Non-Māori

In 2006, Māori people were significantly more likely than non-Māori people to be aware of **both** currently funded NZ On Air and other programmes (e.g. past or never funded) (38%, compared to 22% among non-Māori people).

Non-Māori (42%) respondents were significantly more likely to give a None/Don't know response compared to Māori respondents (34%).

Awareness of Programmes Currently Funded by NZ On Air

	Māori people % 2005	Māori people % 2005
Named only currently funded NZ On Air programmes	5	9
Named both currently funded NZ On Air and other programmes (e.g. past or never funded)	38	22
Named only programmes not currently funded by NZ On Air	23	26
None/Don't know	34	42
Base:	287	685

5.3 Knowledge of Programmes Funded by NZ On Air

As with previous years, the most common way for people to identify that a programme is funded by NZ On Air is by the logo at the end of the programme (63%). All other methods have remained relatively similar (and at low levels) over time.

Knowledge of Programmes Funded by NZ On Air

	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
NZ On Air logo at the end of the programme	60	66	63	64	67	63
NZ On Air logo at the beginning of the programme	13	8	8	11	12	12
From information in the Listener/TV Guide advertisements	-	4	5	5	5	*
New Zealand made	6	5	4	5	2	3
Told at beginning and end of the programme	1	4	3	5	2	4
Quality of the programme	4	1	1	3	1	4
By the content	4	3	4	1	4	3
Stars/New Zealand actors	5	2	2	1	2	2
Māori/in native language	-	-	-	1	0	*
Word of mouth	2	*	1	-	1	1
There is no advertising	-	-	1	-	0	-
By what I read	3	*	1	-	1	*
National Radio	-	-	1	-	1	-
Other	1	*	1	-	-	*
Don't know	15	13	12	16	14	16
Base: Aware of Programmes Funded by NZ On Air	457	455	370	435	496	454

Knowledge of Programmes funded by NZ On Air	Significantly more likely:
Logo appears at end of programme	- Aged 18-34 years - Wellington metropolis

Knowledge of Programmes Funded by NZ On Air – Results of Māori People Compared with Non-Māori People

As with the general population sample, Māori people were most likely to determine that a programme has been funded by NZ On Air by the logo at the end of programmes (72%). All other methods have remained fairly stable since 2002.

Māori are significantly more likely to be aware that a programme is funded by NZ On Air by the logo at the end of the programme (72%) compared to non-Māori respondents (62%).

Knowledge of Programmes Funded by NZ On Air

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
NZ On Air logo at the end of programmes	65	71	72	62
NZ On Air logo at the beginning of programmes	11	8	13	12
From information in the Listener/TV Guide advertisements	-	5	1	-
New Zealand made	6	5	3	3
By the content	3	2	2	2
Told at the beginning and the end of programmes	3	2	4	4
Stars/New Zealand actors	5	1	2	2
Quality of the programme	1	3	5	4
By what I read	1	1	-	*
Word of mouth	-	1	1	1
National Radio	-	-	-	-
There is no advertising	-	-	-	-
They're not commercial programmes/have to be funded by someone	-	-	-	-
Other	-	-	-	*
Don't know	15	13	10	16
Base: Aware of Programmes Funded by NZ On Air	191	173	194	407

5.4 Opinion on the Services NZ On Air Should Fund

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

Key services that people thought were important ('very important' or 'important') for NZ On Air to fund included:

- Teletext subtitles on television programmes (80%).
- New Zealand children's programmes on TV (76%).
- Programmes for people with disabilities (77%).
- In-depth and well researched documentaries on TV (77%).
- New Zealand music (75%).

Conversely, the following services were considered to be of lower importance for NZ On Air funding:

- Māori radio and television partly in Te Reo (56%).
- Pacific Island Radio Stations in New Zealand (52%).
- Programmes for minorities (52%).
- Access radio stations (46%).

Opinion of Services NZ On Air Should Fund

	Very Important %	Important %	Total Important %	Neutral %	Quite Unimportant %	Very Unimportant %
Teletext subtitles on television programmes	56	24	80	14	4	2
New Zealand children's programmes on TV	41	36	76	19	4	2
Programmes for people with disabilities	44	32	77	16	5	2
In-depth documentaries on TV	49	28	77	18	3	2
New Zealand music	46	29	75	18	4	2
Children's programmes reflecting Māori language and culture for all children	35	31	66	23	7	5
Māori radio and television in English	33	29	62	24	9	5
National Radio and Concert FM	35	29	64	26	6	4
New Zealand drama on TV	35	32	68	24	5	3
New Zealand children's drama programmes	36	32	68	23	6	3
Documentaries about Māori people and Māori issues for a general audience	35	30	65	23	7	5
Arts and performance programmes	35	32	66	22	8	4
Programmes for ethnic minorities	28	30	58	29	8	5
New Zealand comedy programmes	33	32	65	25	5	5
Māori radio and television partly in Te Reo	28	27	56	27	11	6
Pacific Island Radio Stations in New Zealand	22	29	52	32	10	6
Programmes for minorities	23	29	52	34	9	6
Access radio stations	19	27	46	42	8	5
Base:	770					

Specific services NZ On Air should fund:	Significantly more likely:
New Zealand children's programmes on TV	<ul style="list-style-type: none"> - Aged 18 to 34 years - Auckland Metropolis - Young family
New Zealand Drama on TV	<ul style="list-style-type: none"> - Female - Aged 45 to 54 years
New Zealand Music	<ul style="list-style-type: none"> - Aged 18 to 34 and 45 to 54 years - Māori - Young/single/couple/group or Young family
Access Radio Stations	<ul style="list-style-type: none"> - Aged 18 to 34 years - Not aware of NZ On Air
In-depth and well researched New Zealand documentaries	<ul style="list-style-type: none"> - Aged 45 to 54 years
New Zealand comedy on TV	<ul style="list-style-type: none"> - Aged 18-34 years - Young family
National Radio and Concert FM	<ul style="list-style-type: none"> - Aged 45 to 54 years
New Zealand Programmes on TV for people with disabilities	<ul style="list-style-type: none"> - Female - Māori
New Zealand programmes for ethnic minorities	<ul style="list-style-type: none"> - Female - Aged 18 to 34 years - Māori - Young/single/couple/group household
New Zealand children's Drama programmes on TV	<ul style="list-style-type: none"> - Female - Aged 45 to 54 years
Māori radio and TV in English language	<ul style="list-style-type: none"> - Female - Māori
New Zealand Comedy	<ul style="list-style-type: none"> - Aged 18 to 34 years - Young family
New Zealand programmes for minorities	<ul style="list-style-type: none"> - Aged 18 to 34 years - Māori - Young/single/couple/group household
New Zealand Arts and Performance programmes	<ul style="list-style-type: none"> - Female - Aged 45 to 54 years
Teletext subtitles on TV programmes	<ul style="list-style-type: none"> - Female - Māori - Young family - Live in minor urban area

Significant differences by demographics (continued)

Specific services NZ On Air should fund:	Significantly more likely:
Māori radio and television partly in Te Reo	<ul style="list-style-type: none"> – Aged 18 to 34 years – Female – Māori – Young family
Pacific Island radio stations	<ul style="list-style-type: none"> – Māori
Documentaries on TV made by Māori, about Māori issues for a general audience	<ul style="list-style-type: none"> – Aged 18 to 34 years – Female – Māori – Young family
Children's programmes on TV reflecting Māori language and culture, but for all children	<ul style="list-style-type: none"> – Aged 18 to 34 – Female – Māori

Opinion of the Services NZ On Air Should Fund - Results of Māori People Compared with Non-Māori People

Overall, Māori people were consistently more likely to consider a wide range of services more important than non-Māori people. These differences are highlighted in the table below.

Opinion of Services NZ On Air Should Fund

	Māori people		Non-Māori people	
	Important (1-2) %	Unimportant (4-5) %	Important (1-2) %	Unimportant (4-5) %
NZ programmes for ethnic minorities	77	8	56	14
Pacific Island Radio Stations in New Zealand	71	9	50	17
New Zealand children's programmes on TV	80	4	76	5
New Zealand music	85	5	73	7
NZ programmes for people with disabilities	87	2	75	7
Teletext subtitles on television programmes	82	5	80	6
Children's programmes reflecting Māori language and culture for all children	83	5	64	12
New Zealand comedy programmes	71	10	65	9
In-depth and well researched NZ documentaries on TV	84	5	77	5
Māori radio and television in English	79	4	60	15
NZ arts and performance programmes	72	7	66	12
Access radio stations	56	8	45	13
Documentaries made by Māori about Māori issues, but for a general audience	85	5	63	12
New Zealand drama on TV	69	8	68	9
New Zealand children's drama programmes	71	4	69	8
National Radio and Concert FM	63	8	63	11
Māori radio and television partly in Te Reo	80	8	53	19
NZ programmes for minorities	68	9	49	15
Base:	292		698	

Comparison of Importance for Funding Between 2005 and 2006

Compared to 2005, there has been a significant increase in the number of people who consider it important for NZ On Air to fund New Zealand drama (68% compared to 62% in 2005), New Zealand Children's drama programmes (68% compared to 62% in 2005) and New Zealand arts and performance programmes (66% compared to 61% in 2005).

Comparison of Importance for Funding Specific Programme Types

	2002	2003	2004	2005	2006
	%	%	%	%	%
Teletext subtitles on television programmes	-	83	78	82	80
New Zealand children's programmes on TV	79	79	78	78	76
NZ programmes for people with disabilities	82	78	76	78	77
In-depth documentaries on TV	75	82	83	76	77
New Zealand music	79	77	75	75	75
Children's programmes reflecting Māori language and culture	63	63	64	63	66
Māori radio and television in English	62	59	61	63	62
National Radio and Concert FM	65	60	60	63	64
New Zealand drama on TV	54	59	62	62	68
New Zealand children's drama programmes	60	63	57	62	68
Documentaries about Māori people and Māori issues for a general audience	63	57	61	61	65
NZ arts and performance programmes	60	46	56	61	66
NZ programmes for ethnic minorities	58	55	57	59	58
New Zealand comedy	56	59	51	59	65
Māori radio and television in Te Reo	54	46	53	54	56
Pacific Island radio stations in New Zealand	49	44	51	54	52
NZ programmes for minorities	52	45	51	51	52
Access radio stations	46	48	46	48	46
Television and radio reception for remote communities*	84	83 ¹²	-	-	
Base:	751	750	751	778	770

¹² 2003 was the last year that this statement was asked.

5.5 Use of Further Funding

Documentaries about New Zealand (13%) and documentaries and discovery programmes (11%) are the most preferred type of programme people would like to see funded if NZ On Air had additional funding available.

In 2006 there was a significant increase in the number of respondents who indicated other reasons than those identified in the table below (11% in 2005 increasing to 21% in 2006). Some of these other responses included increasing current programmes (3%), better quality adult programmes (1%) and academic quiz programmes (1%).

Use of Further Funding

	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
Documentaries/Discovery Programmes	20	19	17	15	11	11
Documentaries about NZ (including culture)	7	8	5	6	11	13 ¹³
Drama	9	7	8	9	6	5
Music	6	5	9	5	6	4 ¹⁴
New Zealand programmes	3	1	3	2	6	5 ¹⁵
New Zealand history/geography	5	5	3	10	5	6
Educational	6	6	5	7	5	8 ¹⁶
Comedy	7	9	5	4	5	6 ¹⁷
Children's	5	5	3	7	4	7 ¹⁸
Sports	4	2	5	6	4	4 ¹⁹
Arts and performance	4	3	4	4	4	6 ²⁰
Current affairs	1	2	3	2	3	2
Māori language and culture	5	3	4	4	2	2
Real life	3	1	2	1	2	2
Overseas movies	*	*	1	-	2	-
Ethnic minority groups	3	1	1	2	1	2
Minority sports	1	2	1	1	1	1
Movies	1	1	1	1	1	1
Local news	*	1	1	1	1	1
English (UK) programmes	2	1	1	-	1	*
Less advertising/commercial free station	1	*	1	-	1	-
Other	10	12	11	10	11	21
Nothing/Don't know	25	28	22	23	26	27
Base:	750	751	750	751	778	770

¹³ Includes New Zealand Documentaries and New Zealand European/Māori culture.

¹⁴ Includes New Zealand music and generic music.

¹⁵ Includes New Zealand dramas and New Zealand programmes.

¹⁶ Includes Nature, environmental and educational programmes for teenagers and unspecified audiences.

¹⁷ Includes New Zealand comedy and general comedy.

¹⁸ Includes children's educational and general children's programmes.

¹⁹ Includes New Zealand sport and generic sports.

²⁰ Includes orchestral/classical, concerts/arts and ballet and promotion of NZ artists.

Use of Further Funding – Results of Māori People Compared with Non-Māori People

When comparing Māori against non-Māori there were some obvious differences²¹. These differences include Māori language and culture, drama and arts and performance.

*Use of Further Funding*²²

	Māori people		Non-Māori people
	2004 %	2006 %	2006 %
Documentaries	12	10	11
Educational	7	5	5
Children's programmes	9	2	4
Music	4	2	5
Documentaries about NZ (culture)	6	15	12
Increase existing programmes	-	2	4
Sports	5	5	5
Comedy	3	2	4
Current affairs	-	4	2
Māori language and culture	9	10	1
Real life	2	2	2
Teletext/disabled information	-	1	1
Minority ethnic groups	4	1	2
Movies	1	1	*
Drama	3	3	9
New Zealand programmes	2	2	1
New Zealand history/ geography	6	6	6
Arts and performance	1	2	5
Minority sports	1	1	1
Self help/ house/ consumer programmes	-	-	-
Local news	-	3	1
Overseas movies/ programmes	-	-	-
English (UK) programmes	-	-	-
Documentaries on history	-	-	-
Less advertising/commercial free station	-	-	-
Other	15	20	18
Nothing/ don't know	22	31	27
Base:	254	292	698

²¹ Significant tests were not carried out as sample sizes were too small.

²² The same category groupings have been used as those in the general population data table.

6.0

New Zealand Television

6.0 New Zealand Television

6.1 Perception of the Amount of New Zealand Made Programmes

Respondents were asked what percentage of programmes shown on television between 6am and midnight they thought were New Zealand made.

The current level of New Zealand made programmes is approximately 33 percent. Consistent with previous years, 16 percent of people correctly estimated between 26 percent and 34 percent of programmes on TV are New Zealand made. Meanwhile, the number of people underestimating the level of funding remains at 22 percent, very similar to the 21 percent in 2005.

Perception of the Amount of New Zealand Made Programmes

	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
0-10 percent	21	20	22	29	21	22
11-15 percent	6	7	8	7	7	6
16-20 percent	16	15	14	18	17	14
21-25 percent	9	9	8	8	7	7
26-34 percent	14	13	14	14	15	16
35-50 percent	12	15	16	18	14	13
51-75 percent	5	3	3	4	5	3
76-100 percent	1	1	1	2	2	2
Don't know	16	18	14	-	12	17
Base:	750	751	750	751	778	770

Estimated percent of New Zealand made programmes	Significantly more likely:
0 to 10%	- Aged 45 to 54 years
16 to 20%	- Aged 35 to 44 years
21 to 25%	- Aged 55+ - Aware of NZ On Air
26 to 34%	- Wellington metropolis
35 to 50%	- Aged 18-35 years - Young family
Don't know	- Aged 55+ - Older couple/single

Perception of the Amount of New Zealand Made Programmes – Results of Māori people Compared with Non-Māori people

Māori people were significantly less likely than non-Māori people to underestimate the percentage of New Zealand made programmes with 15 percent of Māori estimating between 16 and 25 percent, compared to 22 percent of non-Māori people.

Perception of the Amount of New Zealand Made Programmes

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
0-15 percent	20	33	27	28
16-25 percent	17	19	15	22
26-50 percent	36	40	33	29
51-75 percent	7	6	7	3
76-100 percent	3	3		2
Don't know	18	-	14	17
Base:	271	254	292	698

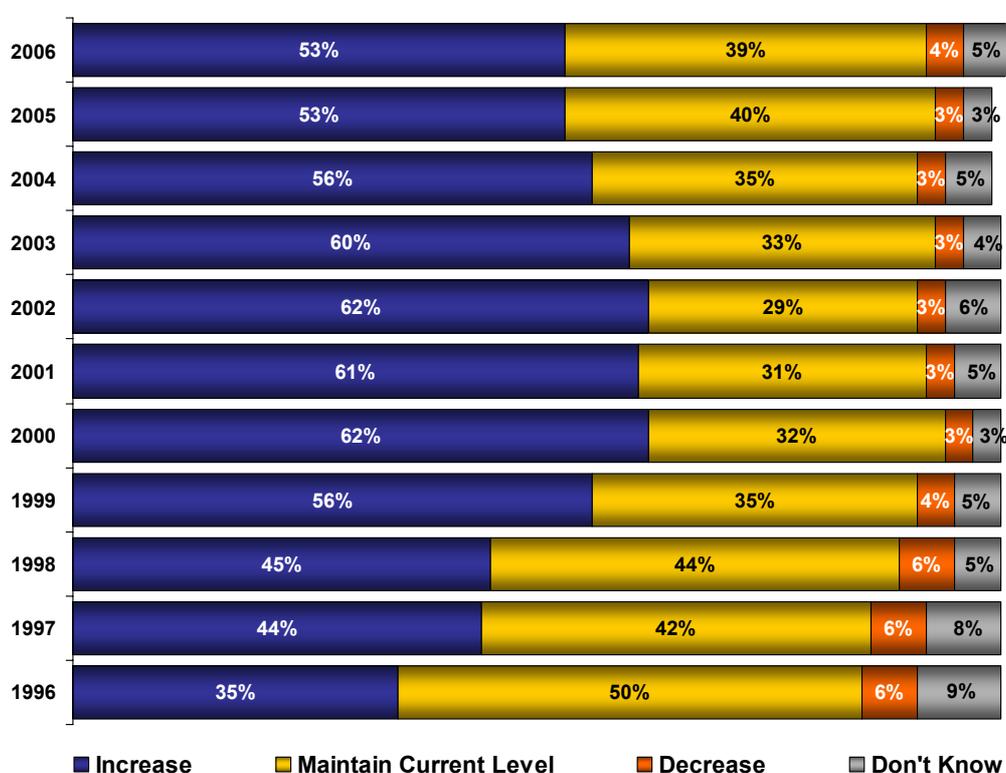
6.2 Should the Amount of New Zealand Local Content on Television Increase?

Respondents were told that currently around 33 percent of programmes shown on television between 6am and midnight are New Zealand made²³. They were then asked whether they felt this figure should increase, remain the same, or decrease.

Just over half (53%) of New Zealanders consider the amount of New Zealand made programmes should increase.

Support for increasing the volume of New Zealand made programmes followed an upward trend from 35 percent in 1996, to 62 percent in 2002. However this percentage has since exhibited a slight downward trend to 53 percent in 2006.

Should the Amount of NZ Local Content on Television Increase?



Base: All respondents

The amount of New Zealand made programmes should:	Significantly more likely:
Increase	<ul style="list-style-type: none"> – Female – Māori – Young family
Stay the same	<ul style="list-style-type: none"> – Male – Aware of NZ On Air – European

²³ It should be noted that in 2003 the question informed respondents that 27 percent of programmes on television are New Zealand made, in 2004 33 percent, in 2005 around 30 percent and in 2006 that around 33 percent of programmes between 6am and midnight are New Zealand made.

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

In 2006, Māori (69%) were significantly more likely than non-Māori (51%) to support an increase in the amount of New Zealand local content on television.

Should the Amount of NZ Local Content on Television Increase?

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Increase	79	74	69	51
Stay the same	18	20	26	40
Decrease	1	2	2	4
Don't know	3	4	3	5
Base:	271	254	292	698

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

Expectation of percentage of local funding is likely to be affected by knowledge of what other countries are doing. To give respondents an understanding of the levels of local programming in other countries, New Zealanders were told that television local content in Australia is around 55 percent, in England it is over 75 percent, and in the United States it is over 90 percent. Given this information, people were again asked whether the amount of New Zealand made programmes should increase, stay the same or decrease.

The 2006 findings are similar to those observed in 2005, for both initial responses and after being told of the comparable funding levels overseas.

After being told these comparable figures, significantly more people said that the amount of New Zealand made programmes should increase (61%, compared to 53% before being told).

Should the Amount of NZ Local Content on Television Increase?

	2001		2002		2003		2004		2005		2006	
	Initial Response %	After Being Told %	Initial Response %	After Being Told %	Initial Response %	After Being Told %	Initial Response %	After Being Told %	Initial Response %	After Being Told %	Initial Response %	After Being Told %
Increase	61	67	62	70	60	69	56	64	53	62	53	61
Stay the same	31	27	29	25	33	25	35	31	40	33	39	32
Decrease	3	3	3	2	3	3	3	3	3	3	4	4
Don't know	5	3	6	3	4	3	5	2	3	2	4	3
Base:	750		751		750		751		778		770	

Opinion of New Zealand's Television Local Content Given the Local Content Levels in Other Countries – Results of Māori People Compared with Non-Māori People

On the basis of being aware of the comparable international figures for locally made content, Māori people were significantly more likely than non-Māori people to consider that the amount of New Zealand local content should increase (75%, compared to 60% of non-Māori people).

Should the Amount of NZ Local Content on Television Increase?

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Increase	80	83	75	60
Stay the same	16	14	21	33
Decrease	1	2	3	3
Don't know	4	2	1	4
Base:	271	254	292	698

6.4 Compulsory Screening of New Zealand Made Programmes

New Zealanders appear to be quite certain in their conviction that a set amount of New Zealand made programming of various genres needs to be broadcast on free-to-air television. Respondents were asked whether they thought free-to-air television channels such as TV1, TV2, TV3, C4, and Prime should be made to screen a set amount of New Zealand made television programmes from a list of programme genres. The table below shows the results.

Please note that until 2003, people were asked whether free-to-air television should screen a minimum amount, while from 2003 onwards were asked in relation to a set amount. Accordingly, because of the change in question, it is possible that more people said that free-to-air channels should be made to screen a set amount of all genres from 2003 onwards, compared to 2002 and earlier.

That aside, 2006 findings are consistent with 2005 findings across all genres.

Free-to-air TV Should Be Made to Screen A Set Amount of Specific Genres

	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
New Zealand made documentaries	76	74	87	89	86	88
New Zealand made children and young persons programmes	75	75	84	86	85	84
New Zealand made programmes	72	71	82	85	83	82
New Zealand made special interest programmes	72	71	81	85	82	83
New Zealand made drama programmes ²⁴	69	66	73	77	77	77
New Zealand made arts and performance programmes	64	64	73	76	74	73
New Zealand made comedy programmes ²⁵	69	66	71	72	71	70
Base:	750	751	750	751	778	770

²⁴ Until 2003, comedy and drama were combined. Accordingly, results from 2000 to 2002 (shown in bold) are combined results.

²⁵ Until 2003, comedy and drama were combined. Accordingly, results from 2000 to 2002 (shown in bold) are combined results.

Should be made to screen	Significantly more likely:
New Zealand made documentaries	<ul style="list-style-type: none"> - Female - Māori - Young family
New Zealand made children and young persons programmes	<ul style="list-style-type: none"> - Female - Young family
New Zealand made programmes	<ul style="list-style-type: none"> - Female - Believes that NZ On Air does buy overseas programmes
New Zealand made special interest programmes	<ul style="list-style-type: none"> - Female - Young family
New Zealand made drama programmes	<ul style="list-style-type: none"> - Female
New Zealand made arts and performance programmes	<ul style="list-style-type: none"> - Aged 45 to 54 years - Female - Māori
New Zealand made comedy programmes	<ul style="list-style-type: none"> - Aged 18-34 years - Young family - Rural area

Compulsory Screening of New Zealand Made Programmes - Results of Māori People Compared with Non-Māori People

For all the genres Māori people in 2006 were significantly more likely than non-Māori people to agree that free-to-air channels should be required to screen a set amount of New Zealand programmes.

Also, since 2002 Māori people have exhibited an increasing likelihood of agreeing that free-to-air channels should be required to screen a set amount of New Zealand made programmes, for all genres.

Free-to-air TV Should Be Made to Screen A Set Amount of Specific Genres

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
New Zealand made children and young persons' programmes	86	93	89	83
New Zealand made documentaries	86	94	93	87
New Zealand made programmes	85	93	89	83
New Zealand made special interest programmes	83	91	91	83
New Zealand made comedy programmes ²⁶	78	78	82	69
New Zealand made arts and performance programmes	77	88	84	72
New Zealand made drama programmes ²⁷	78	78	86	76
Base:	221	254	292	698

²⁶ Until 2003, comedy and drama were combined. Accordingly, results from 2000 to 2002 (shown in bold) are combined results.

²⁷ Until 2003, comedy and drama were combined. Accordingly, results from 2000 to 2002 (shown in bold) are combined results.

6.5 Compulsory Screening of New Zealand Made Programmes Given the Expense

After being told that it was more expensive to buy never seen New Zealand programmes, three quarters (78%) of the sample said that free-to-air channels should be required to screen a certain amount of New Zealand made programmes. This is a decrease from the initial response (82%) indicating that some respondents do consider the cost of New Zealand made programmes when contemplating whether free-to-air channels should be made to screen a certain amount of programmes.

The results in 2006 are almost identical to those seen in 2005.

Should Free-to-air Channels be Made to Screen a Certain Amount of New Zealand Made Programmes?

	2002		2003		2004		2005		2006	
	Initial Response %	Given the Expense %	Initial Response %	Given the Expense %	Initial Response %	Given the Expense %	Initial Response %	Given the Expense %	Initial Response %	Given the Expense %
Yes	71	74	81	76	85	80	83	77	82	78
No	25	22	15	18	12	15	14	19	14	17
Don't know	4	5	3	7	3	5	3	4	4	5
Base:	751		750		751		778		770	

Compulsory Screening of New Zealand Programmes Given the Expense – Results of Māori People Compared with Non-Māori People

Māori people were significantly more likely (88%, compared to 77% of non-Māori people) to consider there should be compulsory screening of New Zealand programmes after being told that it was more expensive to buy local programming.

Since 2002 the percentage of Māori who believe that there should be compulsory screening of New Zealand programmes has steadily risen.

Should Free-to-air Channels be made to Screen a Certain Amount of New Zealand Made Programmes?

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Yes	85	86	88	77
No	9	10	8	18
Don't know	6	4	3	5
Base:	271	254	292	698

7.0
Television Viewing and Radio Listening
Behaviour

7.0 Television Viewing and Radio Listening Behaviour

7.1 New Zealand Music on the Radio

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

More than half believe that the amount of New Zealand music being played on the radio has increased (52%, significantly lower than 57% in 2005).

NZ Music On the Radio

	2002 %	2003 %	2004 %	2005 %	2006 %
Increased	55	57	63	57	52
Stayed about the same	16	17	13	19	21
Decreased	4	5	3	5	4
Don't know	25	21	23	20	23
Base:	751	750	751	778	770

Amount of music on radio	Significantly more likely:
Those who think it has increased	<ul style="list-style-type: none"> - Aged 18-34 years - Young/single/couple/group household - Young family
Those who think it has stayed the same	<ul style="list-style-type: none"> - Aged 55+

New Zealand Music on the Radio - Results of Māori People Compared with Non-Māori People

In 2006, Māori were significantly more likely than non-Māori to believe that the amount of New Zealand music on the radio has increased over the last 12 months (60%, compared to 51% of non-Māori).

NZ Music On the Radio

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Increased	63	67	60	51
Stayed about the same	15	16	21	21
Decreased	5	6	5	3
Don't know	17	11	15	24
Base:	271	254	292	698

Importance of New Zealand music on the radio	Significantly more likely:
Encouragement of New Zealand music	<ul style="list-style-type: none"> – Aged 18-34 – Young/single/couple/group household – Young family – Aware that NZ On Air does not buy overseas programmes
More New Zealand music played on the radio	<ul style="list-style-type: none"> – Aged 18-34 years – Māori – Young/ single/ couple/ group household – Young family

Opinions About (the Importance of) New Zealand - Results of Māori People Compared with Non-Māori People

In 2006, Māori were significantly more likely than non-Māori to believe that it is important that radio stations be encouraged to play more New Zealand music on the radio (72%, compared to 63% of non-Māori people).

Similarly, Māori people were significantly more likely to believe that it is important that radio stations actually play more New Zealand music on the radio (76%, compared to 61% of non-Māori people).

Importance of New Zealand Music on the Radio

	Māori people		Non-Māori people
	2004 %	2006 %	2006 %
Radio stations are encouraged to play more NZ music	85	72	63
More NZ music is played on the radio	81	76	61
Base:	254	292	698

7.3 Radio and Television Programmes Regularly Listened to or Watched

Respondents were read a list of radio and television programmes and services in rotated order and asked if anyone in their household regularly listens to, or watches any of them.

New Zealand television documentaries continue to be the most popularly watched programmes (84%, a significant decrease compared to 90% recorded in 2005).

Several significant decreases were observed in 2006. These significant decreases in the following radio and television programmes were:

- New Zealand special interest programmes (66%, compared to 71% in 2005).
- New Zealand children's programmes (45%, compared to 57% in 2005).
- NZ On Air funded music videos which screen on TV channels (46%, compared to 51% in 2005).
- National Radio (43%, compared to 49% in 2005).
- Māori radio stations and TV programmes in English (33%, compared to 39% in 2005).
- Television programmes with Teletext subtitles (25%, compared to 35% in 2005).
- Concert FM (27%, compared to 34% in 2005).
- Access radio stations (18%, compared to 25% in 2005).
- Māori radio stations and TV programmes in Te Reo (18%, compared to 24% in 2005).
- Student radio stations playing New Zealand music (17%, compared to 24% in 2005).

Radio and Television Programmes Regularly Watched/Listened To

	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
New Zealand documentary programmes on TV made with the help of NZ On Air, (such as <i>Inside New Zealand</i> or documentaries on TV One)	92	89	91	90	90	84
New Zealand special interest programmes on TV made with the help of NZ On Air, (such as <i>ANZAC Day Wreathlaying Ceremony, Attitude or Tagata Pasifika</i>)	39	48	62	66	71	66
New Zealand drama programmes on TV made with the help of NZ On Air, (such as <i>Outrageous Fortune</i> and <i>Orange Roughies</i>)	47	54	64	58	64	62
New Zealand comedy programmes on TV made with the help of NZ On Air, (such as <i>Bro' Town</i> and <i>Seven Periods with Mr Gormsby</i>)	46	56	63	54	64	62
New Zealand arts and performance programmes on TV made with the help of NZ On Air, (such as <i>Front Seat</i> and <i>Top of the Pops</i>)	30	38	50	60	58	55
New Zealand children's programmes on TV made with the help of NZ On Air, (such as <i>Sticky TV</i> and <i>The Go Show</i>)	49	46	56	47	57	45
NZ On Air funded music videos which screen on TV channels like <i>C4</i> and <i>Juice Music Television</i>	42	38	45	41	51	46
National Radio	40	36	49	45	49	43
Māori radio stations and TV programmes in English	-	27	41	35	39	33
Television programmes with Teletext subtitles. These are written words on the screen so people who have difficulty hearing can understand the programmes	26	26	36	25	35	25
Concert FM, which is the radio station that plays classical music	30	29	38	32	34	27
New Zealand programmes on commercial radio stations like " <i>That's the Story</i> " and " <i>Small World</i> "	21	21	33	28	27	31
New Zealand music programmes on commercial radio stations (like <i>the Word</i> and <i>Off the Record</i>) ²⁸	-	-	-	-	-	33
Access radio stations	14	11	25	20	25	18
NZ On Air funded music videos which screen on channels like <i>C4</i> and <i>Juice Music Television</i> ²⁹	-	-	-	-	-	46
Māori radio stations and TV programmes in Te Reo like " <i>Waka Huia</i> ", " <i>Marae</i> " and " <i>Te Karere</i> "	20	18	25	21	24	18
Student radio stations playing New Zealand music which are broadcast from university campuses	14	15	24	21	24	17
Pacific Island radio stations like Samoa Capital Radio in Wellington or Radio 531PI in Auckland	10	8	16	13	16	12
Base:	750	751	750	751	778	770

²⁸ First asked in 2006.

²⁹ First asked in 2006.

Radio or TV Programme	Significantly more likely:
New Zealand comedy programmes	<ul style="list-style-type: none"> - Aged 18 to 34 years - Wellington Metropolis - Young family - Aware of NZ On Air
New Zealand drama programmes	<ul style="list-style-type: none"> - Māori - Aware of NZ On Air - Believe that NZ On Air helps buy overseas programmes
New Zealand documentary programmes	<ul style="list-style-type: none"> - Mature family - Aware of NZ On Air
New Zealand special interest programmes	<ul style="list-style-type: none"> - Female - Aged 55+ - Aware of NZ On Air - Mature family - Rural area
New Zealand children's programmes	<ul style="list-style-type: none"> - Female - Aged 18 to 34 and 35 to 44 years - Māori - Young family - Believe that NZ On Air helps buy overseas programmes
New Zealand arts and performance programmes	<ul style="list-style-type: none"> - Female - Māori - Young and Mature family
Television programmes with Teletext subtitles	<ul style="list-style-type: none"> - Māori - Believe that NZ On Air helps buy overseas programmes
National Radio	<ul style="list-style-type: none"> - Aged 55+
Concert FM	<ul style="list-style-type: none"> - Aged 55+ - Older couple/ single
Access radio stations	<ul style="list-style-type: none"> - Aged 18 to 34 Years - Urban area
Māori radio and television programmes English	<ul style="list-style-type: none"> - Aged 18 to 34 Years - Māori - Young family
Māori Island radio stations	<ul style="list-style-type: none"> - Aged 18 to 34 years - Auckland Metropolitan - Māori - Believe that NZ On Air helps buy overseas programmes
New Zealand music programmes on commercial radio	<ul style="list-style-type: none"> - Aged 18 to 34 and 45 to 54 years - Rural area

stations	
Radio or TV Programme	Significantly more likely:
NZ On Air funded music videos which screen on TV channels such as C4	<ul style="list-style-type: none"> - Aged 18 to 34 and 35 to 44 years - Auckland Metropolis - Māori - Young/single/couple/group household - Young and Mature family - Urban area
Student radio stations playing New Zealand Music	<ul style="list-style-type: none"> - Aged 18 to 34 years - Auckland and Christchurch metropolis - Young/single/couple/group household - Urban area

Radio and Television Programmes Regularly Listened To or Watched - Results of Māori People Compared with Non-Māori People

Māori were significantly more likely to say that people in their household regularly watch a wide range of programmes, compared to non-Māori people. These differences are highlighted in the table below:

Radio and Television Programmes Regularly Watched/Listened To

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
New Zealand television documentary programmes made with the help of NZ On Air, such as <i>Inside New Zealand</i> or documentaries on TV One	96	93	90	84
Pacific Island radio stations such as Samoa Capital Radio in Wellington or Radio 531PI in Auckland	21	30	34	9
New Zealand children's programmes on TV made with the help of NZ On Air, (such as <i>Sticky TV</i> and <i>The Go Show</i>)	70	74	70	43
New Zealand comedy programmes on TV made with the help of NZ On Air, (such as <i>Bro' Town</i> and <i>Seven Periods with Mr Gormsby</i>)	59	57	75	60
New Zealand special interest programmes on TV made with the help of NZ On Air, (like <i>ANZAC Day Wreathlaying Ceremony</i> , <i>Attitude</i> or <i>Tagata Pasifika</i>)	55	65	79	65
NZ On Air funded music videos which screen on TV channels like C4 and <i>Juice Music Television</i>	56	61	68	44
New Zealand arts and performance programmes on TV made with the help of NZ On Air, (such as <i>Front Seat</i> and <i>Top of the Pops</i>)	42	91	68	53
New Zealand drama programmes on TV made with the help of NZ On Air, (such as <i>Outrageous Fortune</i> and <i>Orange Roughies</i>)	63	60	72	61
Māori radio stations and TV programmes in English	75	79	75	28
Teletext subtitles, on television programmes. These are written words on the screen so people who have difficulty hearing can understand the programmes	33	40	35	23
National Radio	26	34	36	43
Access radio stations	18	26	25	27
New Zealand programmes on commercial radio stations such as " <i>That's the Story</i> " and " <i>Small World</i> "	32	30	41	31
New Zealand music programmes on commercial radio stations (such as <i>the Word</i> and <i>Off the Record</i>) ³⁰			44	33

³⁰ First asked in 2006.

Radio and Television Programmes Regularly Watched/Listened To (continued)

	Māori people			Non-Māori people
	2002 %	2004 %	2006 %	2006 %
Māori radio stations and TV programmes in Te Reo <i>like Waka Huia, Marae and Te Karere</i>	74	73	65	13
Student radio stations which is music broadcast from university campuses	17	24	19	34
Concert FM, this is the radio station that plays classical music	25	26	24	26
Base:	271	254	292	698

7.4 NZ On Air Programme Viewing Behaviour

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

The most highly watched programmes in 2006 were:

- *Country Calendar (78%)*
- *What Now? (63%)*
- *Bro' Town (49%)*
- *World of Wearable Arts (48%)*
- *Eating Media Lunch (47%).*

The most highly enjoyed programmes were:

- *Country Calendar (82%)*
- *The ANZAC Day Wreathlaying Ceremony (82%)*
- *The Unauthorised History of New Zealand (80%)*
- *Extraordinary Kiwis (80%)*
- *Bro' Town (76%).*

NZ On Air Programmes Watched/Enjoyed 2006

	Watched	Enjoyed (Like 1-2)
	%	%
Country Calendar	78	82
What Now?	63	65
Our Dirty Little Secret	11	55
Let's Get Inventin'	26	58
Out of the Question	9	45
Eating Media Lunch	47	63
World of Wearable Arts	48	69
Top of the Pops	46	51
Bro' Town	49	76
The Living Room	21	54
The Unauthorised History of New Zealand	41	80
Sir Howard Morrison – 50 Years...	33	75
Asia Down Under	45	58
Sticky TV	37	52
Mai Time	37	53
Tagata Pasifika	40	58
Base:	770	

NZ On Air Programmes Watched/Enjoyed 2006 (continued)

	Watched %	Enjoyed (Like 1-2) %
Squirt	27	43
The Go Show	16	54
Outrageous Fortune	28	65
Give it A Whirl	12	54
Facelift	24	52
Hidden In The Numbers	20	75
Special Investigators	42	70
Seven Periods with Mr Gormsby	35	70
Kiwifruit	15	51
The Market	23	60
The Insider's Guide to Love ³¹	22	62
Praise Be	27	58
Madigan's Quest	21	48
Extraordinary Kiwis	36	80
Interrogation	15	65
Front Seat	23	62
ASB Polyfest	19	68
Orange Roughies	34	56
The House Trap	25	45
Attitude	11	66
Our Lost War: Passchendaele	14	74
Tu Te Puehu	7	68
Doves of War	21	64
ANZAC Day Wreathlaying Ceremony	41	82
Rural Delivery	27	67
Base	770	

³¹ In 2005 this programme was called 'The Insiders Guide to Happiness'.

NZ On Air Programme Viewing Behaviour - Results of Māori People Compared with Non-Māori People

The viewing behaviour of Māori people is markedly different to that of non-Māori people, with Māori people significantly more likely to watch a considerable range of different programmes (highlighted in the table below).

Furthermore, as well as considerably different viewing behaviour, Māori people also exhibit different patterns when compared to non-Māori people, in terms of enjoyment of programmes. Significantly higher findings among Māori people are highlighted with a circle, while significantly lower findings are marked with a box.

NZ On Air Programmes Watched/Enjoyed 2006

	Māori people		Non-Māori people	
	Watched %	Enjoyed (Like 1-2) %	Watched %	Enjoyed (Like 1-2) %
Tagata Pasifika	77	77	37	54
What Now?	82	66	61	64
Top of the Pops	71	59	43	50
Mai Time	80	79	33	48
Bro Town	73	78	47	75
Let's Get Inventin'	38	64	25	57
Sticky TV	57	55	35	49
Out of the Question	7	45	10	43
The Unauthorised history of New Zealand	48	82	40	80
Howard Morrison – 50years in Entertainment	44	77	33	76
Eating Media Lunch	61	48	46	65
The Living Room	25	53	20	56
Squirt	46	46	25	
Madigan's Quest	29	46	19	50
Our Dirty Little Secret	12	57	11	57
The Insider's Guide to Love	30	64	21	62
ANZAC day Wreathlaying Ceremony	54	80	39	81
Asia Down Under	58	58	44	57
Hidden in Numbers	20	67	21	75
Special Investigators	48	71	43	70
Country Calendar	84	79	78	81
Praise Be	37	48	26	59

NZ On Air Programmes Watched/ Enjoyed 2006 (continued)

	Māori people		Non-Māori people	
	Watched %	Enjoyed (Like 1-2) %	Watched %	Enjoyed (Like 1-2) %
The Go Show	29	56	14	51
World of Wearable Arts	49	68	47	71
Extraordinary Kiwis	44	79	35	81
The House Trap	33	51	25	45
Outrageous Fortune	38	69	28	63
The Market	49	75	20	55
ASB Polyfest	50	82	16	65
Our Lost War: Passchendale	14	76	15	74
Facelift	25	61	24	51
Interrogation	17	60	14	68
Orange Roughies	43	64	33	55
Tu Te Puehu	28	80	5	61
Front Seat	24	54	23	61
Doves of War	23	73	20	63
Seven Periods with Mr Gormsby	29	60	35	71
Attitude	14	63	11	65
Rural Delivery	31	75	27	66
Give it a Whirl	15	66	12	54
Kiwifruit	23	43	13	50
Base³²	272		698	

³² Base sizes vary between programmes. The base is the proportion of the whole sample (for both Māori and non-Māori) who have watched a particular programme. Those respondents were then asked if they liked it.

Analysis of Popularity and Enjoyment

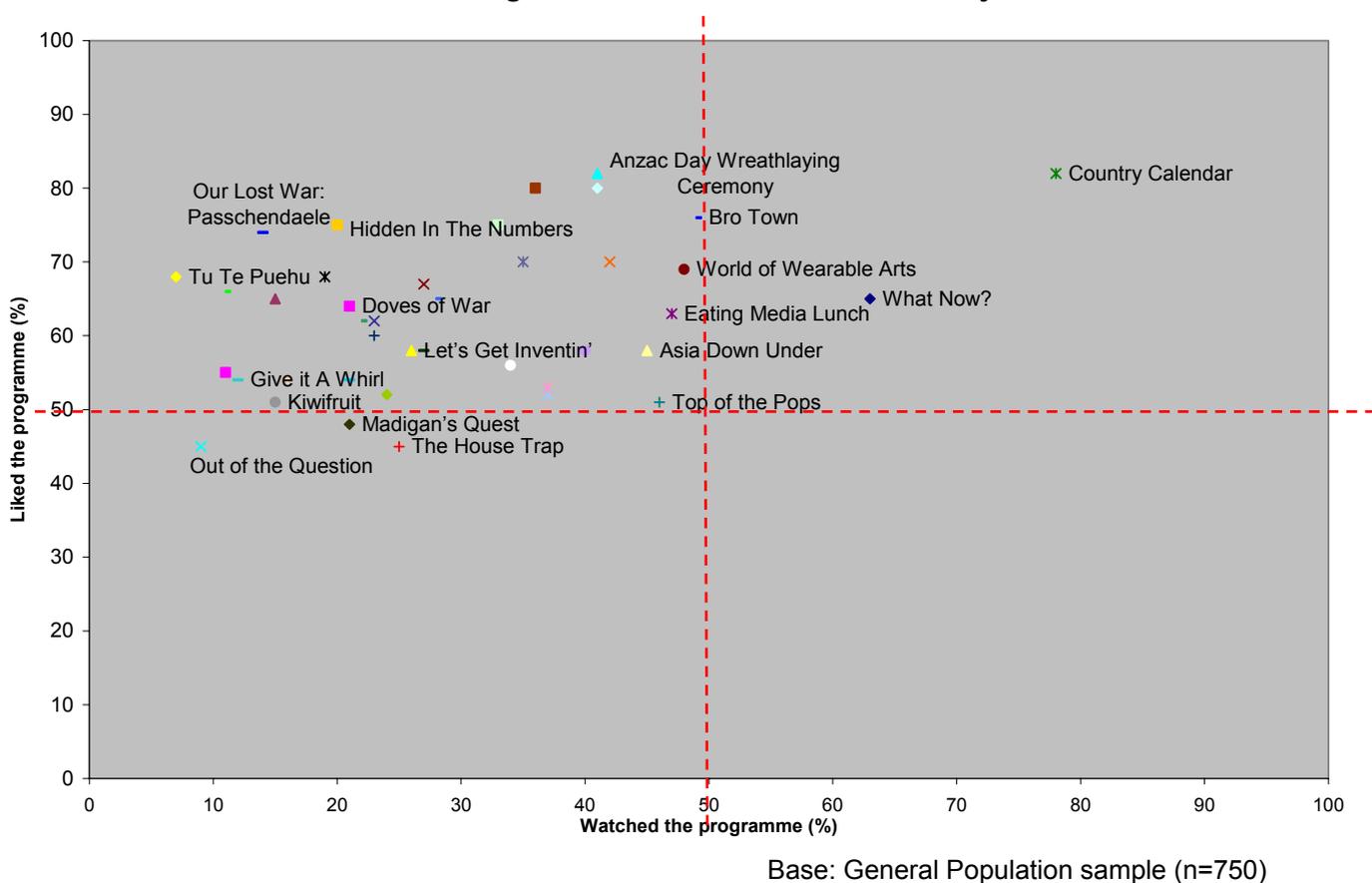
In the chart below, each programme has been plotted on the basis of how many people watched and how many enjoyed it. Programmes in the top right quadrant are watched by a large number of people and have a high level of enjoyment. Those in the bottom right are watched by fewer people but still enjoyed,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

In 2006, two programmes are positioned in the top right hand quadrant, i.e. more frequently watched **and** highly enjoyed and stand out as very successful programmes. Country Calendar is deemed to be the most successful programme followed by What Now? Programmes such as Bro' Town, World of Wearable Arts and Eating Media Lunch are very close to breaking into this quadrant and should also be seen as successful.

The majority of programmes sit in the less often watched, but generally well liked quadrant. These include Hidden In The Numbers, Doves at War, Our Lost War: Passchendaele and Tu Te Puehu.

Three programmes were identified as not often watched and generally not really liked. These programmes were Out of the Question, The House Trap and Madigan's Quest.

Which NZ On Air Programmes are watched and are they liked?³³



³³ Only a selection of programmes are labelled on this graph.

Points to consider regarding viewing behaviour and enjoyment:

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

8.0

Digital Television

8.0 Digital Television

In 2006, the Digital Television section of the questionnaire was expanded to include questions on tuning, quality of reception and reasons for wanting free-to-air digital television and potential influences on this decision.

8.1 Tuning into Television channels

Respondents were asked to indicate which channels they are currently tuned into and rate the quality of their reception for each of these channels. TV One, Two and Three are currently received by the most households (all recorded 97%), and are also deemed to have reception of a high quality (80%, 89% and 87% respectively). Not surprisingly SKY Digital recorded highest reception quality at 93 percent.

Current Channels received and Quality

	Currently Receive		Quality of Reception	
	Yes %	No %	Good (1-2) %	Not Good (4-5) %
TV One	97	3	80	9
TV Two	97	3	89	5
TV Three	97	3	86	7
C4	77	20	74	10
Prime	82	17	75	11
Māori Television	67	29	75	8
Trackside	54	42	75	8
SKY UHF (up to five channels)	23	75	89	7
SKY Digital (up to 133 Channels)	38	61	93	2
Other	14	83	71	12
Base:	770		Receive the channel³⁴	

³⁴ Base size varies with each channel as base size is those respondents who currently receive the specified channel.

Tuning into Television Channels – Results for Māori People Compared to Non-Māori People

Māori were significantly more likely than non-Māori to currently receive Māori Television (86% of Māori compared to 65% of non-Māori), Trackside (67% of Māori compared to 53% of non-Māori) and SKY Digital (48% of Māori compared to 38% of non-Māori).

In regards to the quality of the reception, Māori and non-Māori have very similar opinions.

Current Channels Received and Reception Quality

	Currently Receive - Yes		Quality of Reception – Good (1-2)	
	Māori %	Non-Māori %	Māori %	Non-Māori %
TV One	98	97	80	81
TV Two	98	97	88	89
TV Three	98	97	89	87
C4	79	77	79	74
Prime	85	81	78	74
Māori Television	86	65	81	75
Trackside	67	53	84	76
SKY UHF (up to five channels)	27	22	91	89
SKY Digital (up to 133 Channels)	48	38	95	92
Other	11	15	74	70
Base:	990		Receive the channel³⁵	

³⁵ Base size varies with each channel as base size is those respondents who currently receive the specified channel.

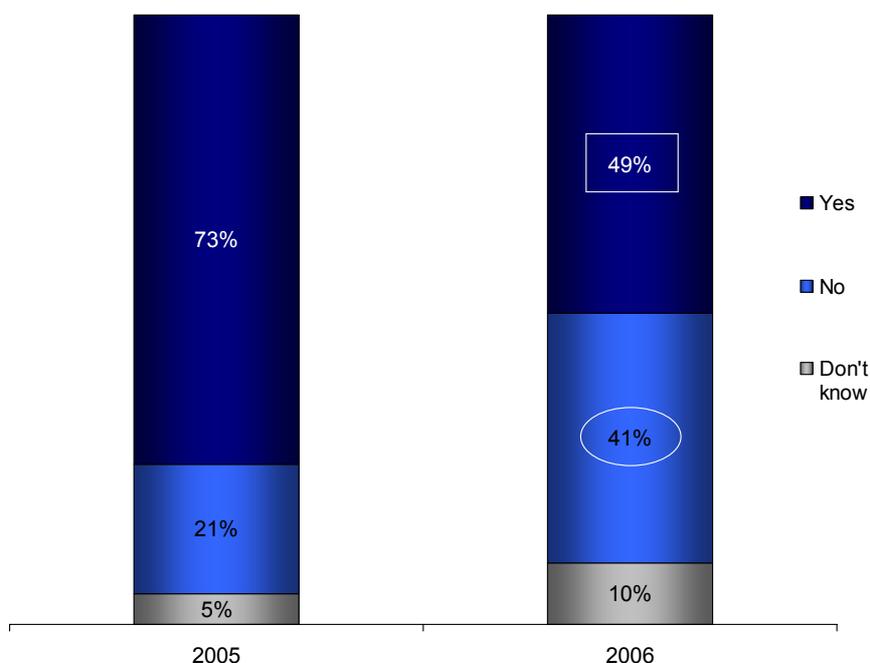
8.2 Set Top Box

Respondents were told that it is possible to receive a range of channels (similar to Sky channels, movies, sport, etc.) through a set top box (a box that sits on top of the television set, similar to a SKY decoder).

When asked if a range of channels was available to them *free* (i.e. no monthly bills like Sky), just under half of all respondents said that they would purchase a set top box to access these channels.

This is a significant decrease since 2005 where nearly three quarters of respondents (73%) indicated they would be interested in paying for a set top box.

Would You Purchase a Set Top Box for Access to Free-to-Air Digital Television?



Base: 2005:778, 2006:770

Would you purchase a set top box?	Significantly more likely:
Yes	<ul style="list-style-type: none"> – Aged 35 to 44 years – Male – Christchurch Provincial – Māori – Young family
No	<ul style="list-style-type: none"> – Aged 55+ – Female – Older couple/single person

Set Top Box – Results of Māori People Compared with Non-Māori People

Māori people are significantly more likely than non-Māori to say they would purchase a set top box if a range of channels was available to them free (58% of Māori respondents compared to 48% of non-Māori respondents).

	Māori people 2006 %	Non-Māori people 2006 %
Yes	58	48
No	34	42
Don't know	8	10
Base:	292	698

Willingness to Pay for Set Top Box

Respondents were asked how much they would be willing to pay for a set top box to access a range of free-to-air channels³⁶.

The table below shows that well over half (63%) of the respondents would only be willing to pay less than \$250 to purchase a set top box to access a range of free-to-air channels.

How Much Are You Willing to Pay For a Set Top Box?

	2006 %
Less than \$250	65
Between \$250 and \$300	5
Between \$301 and \$350	1
Between \$401 and \$450	1
More than \$450	1
Not Willing to Pay	3
Don't Know	24
Base (would purchase a set top box):	374

Price range	Significantly more likely:
Less than \$250	<ul style="list-style-type: none"> - Male - Young/single/couple/group household

³⁶ In 2005 the respondents were asked the same question with the maximum dollar value being \$250. This change means there can be no comparisons made between years in regard to what respondents are prepared to pay for a set top box.

Willingness to Pay for Set Top Box – Results of Māori People Compared with Non-Māori People

There were no significant differences between Māori and non-Māori people in regard to willingness to pay for a set top box. The largest proportion of Māori (58%) would be only willing to pay less than \$250 for a set top box.

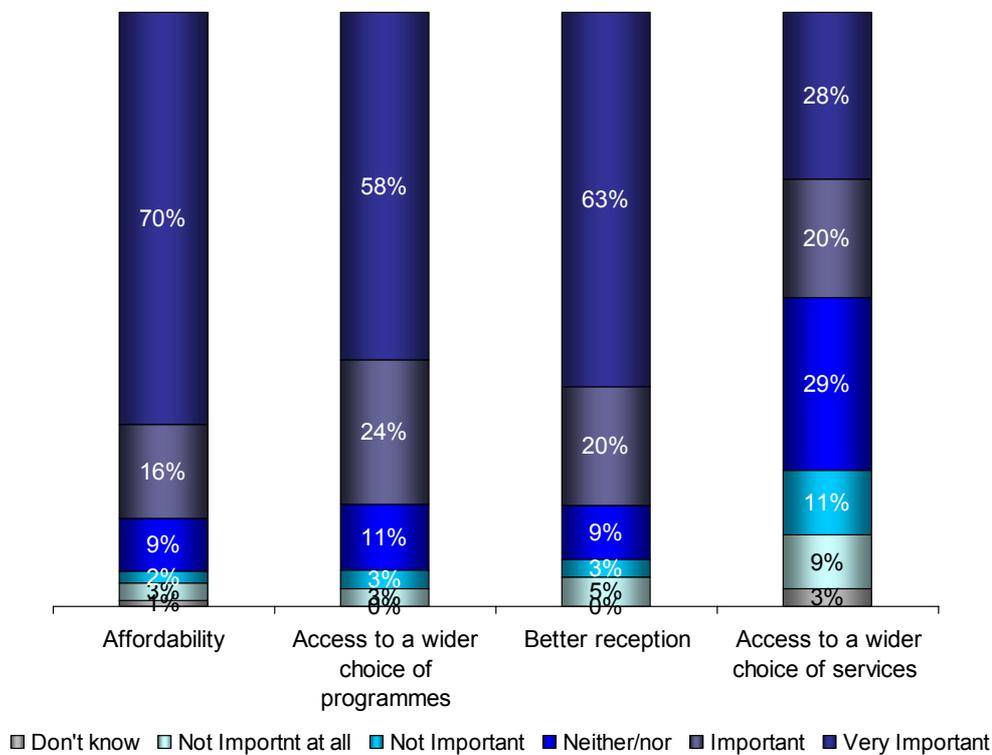
	Māori people 2006 %	Non-Māori people 2006 %
Less than \$250	58	66
Between \$250 and \$300	4	5
Between \$301 and \$350	1	*
Between 401 and \$450	1	1
More than \$450	1	2
Not Willing to Pay	6	3
Don't Know	31	23
Base:	169	332

Influences on the Decision to Buy Free-to-Air Digital Television

Respondents were asked what would influence their decision to purchase free-to-air digital television. The largest influence on the decision is affordability with 86 percent of respondents indicating that the cost is a very important influence on the decision to purchase a free-to-air digital television service. “Access to a wider choice of programming” and “better reception” were also quite important for 82 percent and 83 percent of the sample respectively.

Access to a wider choice of services such as interactive services was identified as having little importance in the decision with 48 percent identifying it as important.

Stated Importance of Factors Influencing the Decision to Purchase Free-to-air Digital Television



Base: 770

Respondents were also asked whether digital free-to-air could offer them a series of wider choices.

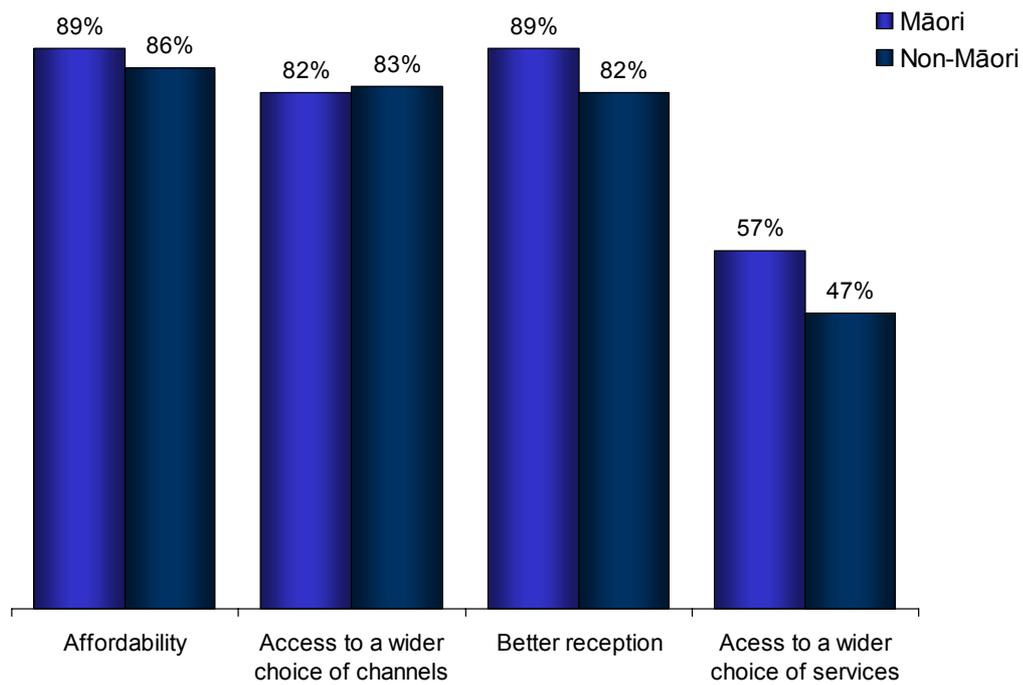
Could Free-to-air Digital Television Offer You the Following?

	Yes %	No %	Don't Know %
A wider choice of channels	81	10	9
A wider choice of programmes	82	9	9
A wider choice of services such as interactive services	75	11	14
Better reception quality	81	13	6
Base:	374		

The majority of respondents have high expectations of what free-to-air digital television will offer them, with over 80 percent of respondents indicating they could be offered a wider choice of channels (81%), a wider choice of programmes (82%) and better reception quality (81%).

Influences on the Decision to Buy Free-to-air Digital Television - Results of Māori People Compared with Non-Māori People

When looking at the comparison between Māori and non-Māori there is little difference between the two groups' opinions. Affordability (89%), access to a wider choice of channels (82%) and better reception (89%) are all large influences on Māori decisions to purchase free-to-air digital television.



Base: Māori 169, Non-Māori 332

When looking at the differences between Māori and non-Māori in regards to what free-to-air digital television could offer the respondents there were no significant differences between the two groups. The results were as follows:

Could Free-to-air Digital Television Offer You the Following?

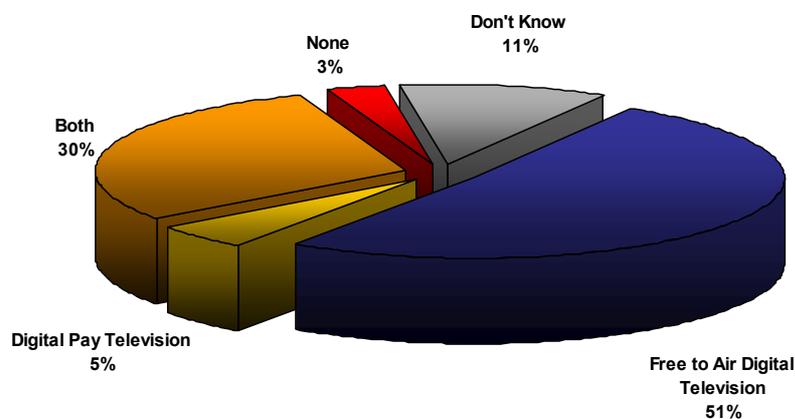
	Māori Yes %	Non-Māori No %
A wider choice of channels	85	82
A wider choice of programmes	86	82
A wider choice of services such as interactive services	79	74
Better reception quality	86	80
Base:	374	

8.3 Preferences towards Digital Television

Which Type of Digital Television Would you Prefer?

The respondents were asked if given the choice which type of digital service (if any) would they like to receive. Just over half (51%) stated that they would prefer free-to-air digital television, and 30 percent indicated that would prefer both free-to-air and pay digital television.

Which Type of Digital Television Would You Rather Receive?



Base: 374.

When asked the reason for their choice the following reasons were the most popular:

- More variety of channels (24%)
- It's free (21%)
- Better reception (7%)
- Not willing to pay/shouldn't have to pay for television (6%)
- It would be cheaper (5%)
- No monthly payments (5%).

Given the Decision How Important Are Certain Factors in Influencing This Decision?

Respondents were asked given their choice of digital television service, how much influence would the factors in the table below have on their preferred digital service.

Reception quality (84%), overall cost (83%) and access to a wider choice of channels (83%) were deemed to have the largest influence, and access to live sports channels (61%) having the least influence.

Factors Influencing the Choice of Digital Television Service

	Important %
Overall Cost	83
Access to a wider choice of channels	83
Access to live sports programmes	61
Access to a wide range of movies	72
Better reception quality	84
Base:	374

Which Type of Digital Television Would You Prefer? - Results of Māori People Compared with Non-Māori People

Both Māori and non-Māori followed the same trends with free-to-air digital television recording the highest percentage (58% and 52% respectively), followed by both digital television types (27% and 30% respectively).

Which Type of Digital Television Would You Rather Receive?

	Māori %	Non-Māori %
Free-to-air Digital Television	58	52
Digital Pay Television	5	5
Both	27	30
None	2	3
Don't Know	8	11
Base:	169	332

Māori and non-Māori responses were also similar when looking at the reasons for electing a particular digital television service. The fact that it would be free was the most common reason (26% of Māori compared to 21% of non-Māori). This was followed by more variety of channels (22% of Māori compared to 24% of non-Māori). Other reasons include that it is cheaper, respondents are not willing/shouldn't have to pay, no monthly payments, and better reception.

Reasons for Choosing Type of Digital Television Service

	Māori %	Non-Māori %
It's free	26	21
More variety of channels	22	24
Cheaper	8	5
Not willing to pay/shouldn't have to pay	7	6
No monthly payments	8	4
Better reception	9	7
Don't Know	8	9
Base:	169	332

Given the Decision How Important Are Certain Factors in Influencing this Decision? - Results of Māori People Compared with Non-Māori People

Māori were significantly more likely than non-Māori to indicate many factors would greatly influence the decision on which digital television service they would prefer. These significant differences include:

- Overall cost (90% of Māori compared to 83% of non-Māori).
- Access to live sports programmes (74% of Māori compared to 61% of non-Māori).
- Access to a wider range of movies (83% of Māori compared to 71% of non-Māori).
- Better reception (94% of Māori compared to 82% of non-Māori).

Factors Influencing the Choice of Digital Television Service

	Māori %	Non-Māori %
Overall Cost	90	83
Access to a wider choice of channels	87	83
Access to live sports programmes	74	61
Access to a wide range of movies	83	71
Better reception	94	82
Base:	169	332

Questionnaire

Appendix

Appendix One: Sample Profile- Main Sample

	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
Gender						
Male	37	38	37	39	39	40
Female	63	64	63	61	61	60
Age						
18-24 years	9	9	11	13	12	9
25-34 years	20	21	18	18	17	16
35-44 years	24	23	23	20	24	24
45-54 years	21	17	18	19	21	20
55-64 years	12	14	15	15	13	15
65+ years	14	15	14	15	14	15
Refused	*	*	*	-	-	1
Ethnicity						
New Zealand European	79	81	78	80	77	77
Māori	8	8	8	7	9	10
Pacific Islander	4	3	4	4	7	4
Other	9	8	10	10	8	9
Employment Status						
Employed full time	49	53	53	53	51	53
Employed part time	17	15	13	15	16	14
Retired	18	17	16	15	5	16
Home maker	7	6	5	6	2	7
Student	6	5	7	6	1	5
Unemployed	3	3	4	4	2	4
Don't know	*	1	1	1	2	-
Refused	-	-	-	-	3	1
Highest Education Level						
School	49	49	45	48	46	49
Technical	15	17	18	14	14	17
University	31	31	34	36	38	33
Other	2	*	-	-	0	0
Don't Know/Refused	-	3	2	1	1	1
Household Structure						
Young – single couple	16	17	19	19	7	4
Group flatting					5	4
Young couple no children	34	35	32	30	7	7
Young family	20	18	18	19	8	9
Family mainly school aged	29	30	29	31	25	23
Mature family	-	1	1	-	18	20
Older couple/single	-	-	-	-	30	32
Refused	-	-	-	-	0	1
Base:	750	751	750	751	778	770

Sample Profile continued

	2001 %	2002 %	2003 %	2004 %	2005 %	2006 %
Area						
Whangarei	2	2	2	2	2	3
Auckland	37	37	37	32	33	31
Hamilton	6	6	6	6	6	6
Tauranga	4	4	4	4	4	5
Rotorua	2	2	2	2	2	2
Gisborne	1	1	1	1	2	2
Napier	2	2	2	2	2	2
Hastings	2	2	2	2	2	3
New Plymouth	2	2	2	2	3	2
Wanganui	2	2	2	2	2	2
Palmerston North	3	3	3	3	3	3
Wellington	14	14	14	15	15	14
Nelson	2	2	2	2	2	2
Christchurch	14	14	14	15	15	14
West Coast	-	-	-	-	-	-
Dunedin	5	5	5	5	5	6
Invercargill	2	2	2	2	2	2
Area Status						
Urban	71	74	72	66	68	71
Secondary	7	7	8	9	7	8
Minor urban	12	9	10	13	11	12
Rural	11	10	11	12	14	9
Household Income						
Less than \$15,000	7	8	7	8	8	7
\$15,001 – \$25,000	9	10	12	9	8	10
\$25,001 – \$35,000	13	12	11	11	13	10
\$35,001 – \$45,000	12	10	14	11	10	10
\$45,001 – \$55,000	9	7	10	10	8	7
\$55,001 – \$70,000	10	11	9	13	13	11
\$70,001 – \$85,000	6	6	5	6	9	8
\$85,001 +	12	12	12	15	15	17
Don't know	22	24	20	8	7	7
Refused	-	-	-	-	9	12
Base:	750	751	750	751	778	770

Terms and Conditions

1.0 The Contract

- 1.1 The Client appoints the Company and the Company accepts such appointment to provide the Services and Deliverables upon these terms and conditions. Only changes agreed by both parties in writing are valid.

2.0 Payment of Fees

- 2.1 For customised continuous research services, unless agreed otherwise in writing, payment of the basic annual fees will be made in advance in equal monthly instalments commencing on the date agreed between the parties in writing in any year.
- 2.2 For customised ad-hoc research services, unless otherwise agreed in writing, payment of the fees shall be one-half on the Acceptance date and the balance on delivery of the Deliverables. If a Service is to be carried out in stages, with interim Deliverables, final invoices for each stage will be raised on delivery of relevant interim Deliverables.
- 2.3 All invoices shall be due on the invoice date and shall be subject to payment within 7 days. Any payment after this 7 day period shall entitle Company to charge interest at the rate permitted by law.
- 2.4 The Company shall be entitled to recover reasonable expenses incurred pursuant to the provision of the Services as agreed between the Company and the Client.

3.0 Termination

- 3.1 Either party may terminate this Contract immediately for a material breach by the other which is not remedied within 30 days of written notice.

4.0 Change, Delay or Cancellation

- 4.1 Client hereby agrees to pay Company for any changes requested by it to the Service at standard Company rates.
- 4.2 If a Service is shortened, delayed, cancelled or terminated early by the Client, the final invoice will include, the balance of the fees for providing the Service plus a cancellation fee and any reasonable costs and expenses incurred by the Company due to the Client's acts or omissions. For example, the Client shall be liable for the costs and expenses incurred by the Company for pre-booked fieldwork, which is delayed, not used or not fully used by reason of the Client's acts or omissions.
- 4.3 If materials are required from Client for Company to deliver the Service these will be delivered promptly to Company. If not delivered promptly this may cause delays and additional costs and expenses, which Client agrees to pay for (if reasonable).

5.0 Subcontracting

- 5.1 The Company may use other TNS Group Companies or third party subcontractors as necessary in delivering the Service.

6.0 Company's Obligations

- 6.1 The Company warrants that it shall use reasonable skill and care in providing the Service and Deliverables. The response rates to surveys/questionnaires cannot always be predicted and are not guaranteed by the Company. Figures contained in Deliverables will be estimates derived from sample surveys and subject to the limits of statistical errors/rounding up or down.
- 6.2 The Company disclaims all other warranties, either express or implied, including warranties for merchantability, and fitness for a particular purpose.

- 6.3 The Company agrees to use reasonable endeavours to comply with the ESOMAR and Market Research Society Codes of Conduct.

7.0 Intellectual Property Rights and Public Statements

- 7.1 The Intellectual Property Rights in the Deliverables vest in the Client subject to payment of all fees due to the Company in respect of such Deliverables. The Company and TNS Group Companies shall have the right to use such Deliverables for their internal use, and in connection with any relevant legal dispute without charge.
- 7.2 The Client shall not disclose the Deliverable publicly in any manner that exaggerates, distorts or misrepresents or that is likely to harm the Company's or TNS Group Companies' reputation or business.
- 7.3 Any public statement, marketing material, press releases or the like that contain the whole or any part of the Deliverables shall only be (a) disclosed upon prior written consent of the Company (which consent shall not be unreasonably withheld), and (b) accompanied by an acknowledgement, such as "Data/figures/information supplied by TNS".
- 7.4 The parties shall be entitled to list the other as its' service provider or client in marketing/promotional material, except for this right the Client shall have no right to use the Company's name, trade mark TNS, logo, or slogans without the prior written consent of the Company.

8.0 Confidentiality

- 8.1 The receiving party agrees that it shall (a) use the Confidential Information only to full its obligations pursuant to this Contract; (b) treat all Confidential Information of the disclosing party as secret and confidential and shall not copy or disclose any such Confidential Information to any third party; (c) not, without the express written consent of the disclosing party, disclose the Confidential Information or any part of it to any person except to the receiving party's directors, employees, parent company, subsidiaries or agreed subcontractors, who need access to such Confidential Information for use in connection with the Services and who are bound by appropriate confidentiality and non-use obligations; and (d) comply promptly with any written request from the disclosing party to destroy or return any of the disclosing party's Confidential Information (and all copies, summaries and extracts of such Confidential Information) then in the receiving party's power or possession.

9.0 Data Protection

- 9.1 Both parties undertake to comply with data protection legislation and to keep personal data supplied by the other secure and only use such data in accordance with such data protection legislation. Subject to prior consent from an individual the Company reserves the right to re-contact an individual for participations in further surveys.

10.0 Limits and Exclusions of Liability

- 10.1 Unless otherwise agreed by a letter or fax which is executed by both parties, the Company's liability for any for any claims, demands, damages, costs (including legal costs) and expenses resulting from any tortious act or omission, and/or breach of the terms and conditions set out in the Contract is strictly limited to the amount of any fees receivable by the Company in respect of the specific Deliverable which is the subject of the potential claim.
- 10.2 Neither party shall be liable for the other's loss of profits, loss of turnover, loss of data, loss of business opportunities, or consequential loss. Liability is not excluded for (a) fraudulent misrepresentations, or (b) death or personal injury caused by the negligence of either party. The Company shall not be liable for any loss howsoever arising from or in connection with the Client's interpretation of the Deliverables.

11.0 Product Testing

- 11.1 Where the Service involves testing or using the Client's products (including prototypes) and/or third party products supplied by Client, the Client shall indemnify the Company and TNS Group Companies from and against any losses, 3rd party claims, demands, damages, costs, charges, expenses or liabilities (or actions, investigations or other proceedings in respect thereof) which the Company and TNS Group Companies may suffer or incur relating to testing or using such products.

12.0 Miscellaneous

- 12.1 The obligations set out in clauses 2, 4, 7, 8, 9, 10, 11, and 12 shall survive termination.
- 12.2 Any notice given hereunder shall be by post or facsimile. In the case of the notice to the Company, notices shall also be copied to Murray Campbell, Managing Director – New Zealand, PO Box 26 254, Epsom, Auckland; fax +649 525 0876. Email notification is not sufficient.
- 12.3 The Company shall not be liable for failure to perform its obligations hereunder due to, fires, storms, riots, strikes, disease, shortages of materials, lock-outs, wars, key employees not being available to perform the Services through death, illness or departure from the Company, floods, civil disturbances, terrorism, Governmental control, restriction or prohibition whether local or national.
- 12.4 The invalidity or unenforceability of any part of this Contract shall not affect the other provisions of this Contract.
- 12.5 No term of this Contract shall be enforceable by a third party.
- 12.6 New Zealand law governs this Contract and in the event of a dispute the parties agree to submit to the non-exclusive jurisdiction of the New Zealand courts.

Definitions

"Acceptance" means written, oral or other acceptance by a Client of a Proposal by the Company for the Service.

"Client" means the party to whom the Company provides the Service.

"Confidential Information" means in respect of the Service all information, data or material of whatsoever nature in any form, which either party, discloses to the other pursuant to this Contract including the Proposal. It shall not include any information or materials which: (a) is in or enters into the public domain (other than as a result of disclosure by the receiving party or any third party to whom the receiving party disclosed such information); (b) were already in the lawful possession of the receiving party prior to the disclosure by the disclosing party; (c) are subsequently obtained by the receiving party from a third party who is free to disclose them to the receiving party; or (d) are required to be disclosed by law or regulatory authority.

"Contract" means these terms and conditions together with the Proposal. In the event of conflict these terms and conditions prevail over those in the Proposal.

"Customised Ad-hoc Research Service" means research studies designed specifically for the Client that are carried out on a case-by-case basis by the Company.

"Customised Continuous Research Service" means research studies designed specifically for the client by the Company that are carried out on a regular repeat basis.

"Deliverables" means survey results, reports, data, summaries, comments, discussion, and/or analysis provided by the Company to Client pursuant to the Contract.

“Intellectual Property Rights” means copyright, database rights, trademarks, designs, patents and/or know how.

“Proposal” means the written proposal and/or quotation provided by the Company to the Client (which is valid for three (3) months).

“Service” means the Customized Continuous Service as specified in the Proposal..

“TNS Group Companies” means Taylor Nelson Sofres plc and its subsidiaries and affiliates.

In these terms and conditions a reference to the singular includes plural and vice versa (unless the context otherwise requires).

© 2004 Taylor Nelson Sofres plc. All rights reserved.