

Local 2003

New Zealand Television

Content

Local 2003

New Zealand Television

Content

Table of Contents

Chairman's Introduction	1
Executive Summary	4
A new way of measuring Local Content	6
2003 Results: Total Hours	7
First Run Hours	10
Prime Time Hours	14
Repeat Hours	17
Trends by Genre	18
Information programming	18
Documentaries	20
Maori Programming	21
Children's Programmes	22
Entertainment	23
News and Current Affairs	24
Sports	25
Drama/Comedy Hours	26
Other Channels	27
Appendix 1: Notes on Methodology	28

Chairman's introduction

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

Last year was particularly significant for local content and public service broadcasting in New Zealand. TVNZ's charter came into action in March 2003, with its requirement to, *"feature programming that serves the varied interests and informational needs and age groups within New Zealand society, including tastes and interests not generally catered for by other national broadcasters"* and *"support and promote the talents and creative resources of New Zealanders and of the independent New Zealand film and television industry."*

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

It makes sense that this annual report should become a central document for the Television Local Content Group as a tool by which to set targets and measure results. To better match the survey to the Group's work, we are introducing some changes to the report this year. In section three of this document we summarise these changes.

So how is local content progressing?

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

TVOne	52%
TV2	17%
TV3	20%

As this report will show, all channels are in excess of these baselines for 2003.

TVOne screened	54.6% local content
TV2 screened	24.3%
TV3 screened	20.4%

In 2003, the total amount of local content across the three main national free-to-air channels was 33.1%, for the period six am to midnight, down slightly from 2002's record high of 35.8%.

The decrease is largely because of a reduction in sports hours. If you were a sports fan in 2002 you were unusually blessed, with the Winter Olympics, the Commonwealth Games and the Louis Vuitton Cup all being broadcast in the that year. In 2003, even the mixture of the combination of the America's Cup and the Rugby World Cup couldn't rival that peak.

Against that decrease, we must remember that 2003 still ranks as the second highest level of local content on record (after 2002).

We have also seen some other notable changes in 2003. Children's hours increased by 81 hours, or over 14%. Documentary hours increased slightly, and prime time local content increased across all channels, by 6% overall.

While these achievements are impressive they mask an ongoing fragility, particularly in those genres that have higher production costs, or are perceived as having low commercial value. This report highlights the vulnerability of scripted comedy and Maori programmes to significant year-on-year fluctuations. While the 2003 report reveals a good presence of drama on screen, a dramatic decline in production from early 2004 is likely to be reflected in a similar "see-saw" effect in this category when the next local content report is published.

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

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

Of special interest to the taxpayer is the level of local content funded by NZ On Air. In last year's survey, we noted an increase in the proportion of the total local content that was funded by this organisation. This year that figure has again increased, to 23% (for the hours 6 am to midnight). This change reflects the slow and steady growth of our funding budget, but was also related to the decrease in sports coverage by comparison with 2002. NZ On Air funding is allocated not only to provide local content, but also to boost the range and diversity of local content that would otherwise be available in a wholly commercial market.

In purely quantitative terms, New Zealand has most frequently compared its local content performance with Australia, which mandates a local content transmission quota of 55% on all its free-to-air commercial networks. As will be apparent from the 2003 results, TVOne is very close to this total. On the other hand, both TV2 and TV3 have historically carried local content at around 20% of their schedules, so that if Australia were to be the benchmark we have some way to go.

In March 2004 TVNZ Chief Executive Ian Fraser committed to increasing local content across TVOne and TV2 to an average of 50%, to be achieved over a period of four to five years. It is not yet clear how this ambitious target will be able to be achieved, given that significant additional investment will be needed to sustain it. This is a laudable aim, however, particularly as it would result in up to 1,400 more local content hours per annum.

Broadcasting is a medium through which New Zealanders can connect with each other at a national and community level, and differentiate themselves within the global village. In January 2003, Steve Maharey, Minister of Broadcasting stated that, “... *in a globalising world, where CNN reports the news across the planet and internationally-sourced programming is cheaper than locally produced material, we have a responsibility to ensure our publicly owned channels reflect New Zealand interests, tell New Zealand stories, and interpret foreign events through our eyes.*” This issue of the increasingly one-dimensional nature of images in a globalising world was also addressed by Michael D Higgins, in a paper delivered in New Zealand in 1999, “... *the great majority of the world’s citizens are reduced by [the new world order in communications] to the condition of consumers - and what they mainly consume are visual images, sometimes woefully misrepresenting themselves, coming from one particular part of the planet, the United States,... the choice is whether we become the consumers of images in a passive culture or the makers of images in a an active culture...*” whether we become victims of the “*colonisation of the imagination*”.

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

Don Hunn

Chair

NZ On Air

Overview

- Local content in 2003 was the second highest on record: only 2002 was higher.
- Total hours in 2003 were 6,675 (compared with 7,201 in 2002, and 6,190 in 2001).
- Local content accounted for 33.1% (35.8% in 2002) of the 6am to midnight broadcast hours (25.4% for the 24 hour clock; 27.4% in 2002).
- TVOne screened 54.6% local content for the hours 6am to midnight.
- TV2 screened 24.3% local content for the hours 6am to midnight.
- TV3 screened 20.4% local content for the hours 6am to midnight.
- Prime time local content hours increased by 6% in 2003 (from 1,734 in 2002 to 1,841 in 2003).
- Prime time local content hours increased across all three free-to-air channels.

Main variations (2003 vs 2002)

- The main decreases in total hours in 2003 were in the areas of:
 - Sports (down 365 hours, due largely to an exceptionally high level of sports coverage in 2002).
 - News and current affairs fell by 52 hours to 2,059. The fall was mostly on TVOne. By contrast TV2's news and current affairs increased by 250% in 2003.
 - Drama and comedy fell by 30 hours. Most of this was due to a 22 hour reduction in locally made drama and comedy on TV3.
 - Information programming (down by 19 hours to 1,303).
 - Entertainment programming was down by 192 hours, due largely to the cancellation of *M2* on TV2.
- One genre showed a significant increase in 2003 - children's programmes:
 - Total children's programming increased by 81 hours
 - This was due mainly to a 75 hour increase on TV2
 - First-run children's hours on TV3 increased, but this was offset by a decrease in repeat children's hours
 - A number of new children's programmes were introduced in 2003, including drama series *Hard Out* and *Freaky*.
- Other increases in 2003 were:
 - Documentary hours increased slightly.
 - Maori programming increased by 8 hours.

Channel Output

- As a percentage of their 6 am to midnight broadcast hours, channel output was as follows:
 - TVOne screened 43% total first-run local content (49.3% in 2002)
 - TV2 screened 18.4% total first-run local content (19.2% in 2002)
 - TV3 screened 17.3% total first-run local content (18.8% in)

- As a percentage of their total prime time hours (6pm-10pm):
 - TVOne screened 60.3% local content (57.2% in 2002)
 - TV2 screened 24.7% local content (20.2% in 2002)
 - TV3 screened 41.1% local content (41.4% in 2002)

NZ On Air's contribution

- NZ On Air contributed funding to 23% of the total New Zealand hours in 2003 (18 hour clock).
- NZ On Air's contribution to both prime time hours and first-run hours increased in 2003:
 - NZ On Air's contribution to prime time hours increased by 1% - making up 13.2% of total prime time local content in 2003.
 - NZ On Air's contribution to first-run hours increased by 2.6% - making up 18.4% of total first-run programming in 2003.

18 hour clock

- This is the first year NZ On Air has measured and reported local content hours on an 18 hour clock (from 6am to midnight). Key points to note:
 - There were few variations in genre totals between the 18 hour clock and 24 hour clock
 - Total broadcast hours on the 24 hour clock: 8760 hours. Total broadcast hours on the 18 hour clock: 6570 hours.

A New Way of Measuring Local Content

The Local Content report has measured the hours of local content on New Zealand's three nationwide channels (TVOne, TV2 and TV3) since NZ On Air was established.

In 2003, the Local Content Group was formed, with the aim of establishing and monitoring appropriate voluntary quotas for local content. The Local Content Group is made up of TVNZ, TV3, Prime TV and representatives of SPADA and NZ On Air.

NZ On Air's Local Content report has become a core resource for the Local Content Group, an authoritative measure of the status of local content on New Zealand television over the past decade and a half.

To better help the Local Content Group in its work, it has been decided to make two key changes to the report:

- First, local content will be measured in terms of the 18 hour period from 6am - midnight. This is the standard international approach for measuring local content levels, and moving to the 18 hour clock will allow us to make meaningful comparisons with other countries, most notably Australia where all commercial broadcasters are required to meet a local content quota of 55% across the 6am to midnight schedule.
- The second difference is in the area of genres. NZ On Air's Local Content report has looked at nine distinct genres. The Local Content Group will also focus on four main genre groupings, and again, this report will change to accommodate this new focus.

These changes will be introduced over time. This year is the transition year, and reporting will be done primarily as it has been in the past, in order to continue to make meaningful comparisons with last year. From next year, the reporting will move to focus on the new measures.

Each of the previously recorded genres are tracked individually as for the first years of the survey. In addition, however, the Local Content Groupings agreed by the Local Content Group, are also recorded - Drama/Comedy/Children's Drama, Children's, Documentary/Information, Entertainment/Maori, News and Current Affairs/Sports.

This is therefore a transitional document to take us from reporting against the 24 hour clock to the 18 hour clock (6am-midnight). For this reason, the primary comparisons are made against the 24 hour clock. In most cases there are no differences between the 24 hour and the 18 hour clock, so the 18 hour figures can be compared with previous years. Where there are differences, these are recorded where appropriate in each section.

This method is designed to move us to reporting on only 6am to midnight results in the next local content report.

All graphs and tables show the demarcation from 24 to 18 hour reporting. Where a difference occurs the 24 hour figure (ie the difference due to those local content programmes screened between 12am - 6am) is recorded in parenthesis in the graphs.

In addition the graphs and figures all now begin at 1994 for ease of presentation. Anyone wishing to track the figures back to 1989 can consult earlier reports.

4

2003 Results - Total Hours

After a leap in 2002, caused mainly by a huge increase in sports coverage, total hours dropped to 6675 by the 24 hour clock and 6526 by the 18 hour clock. This result meant that local content comprised 33.1% of the 6am to midnight schedule (35.8% in 2002).

TVOne

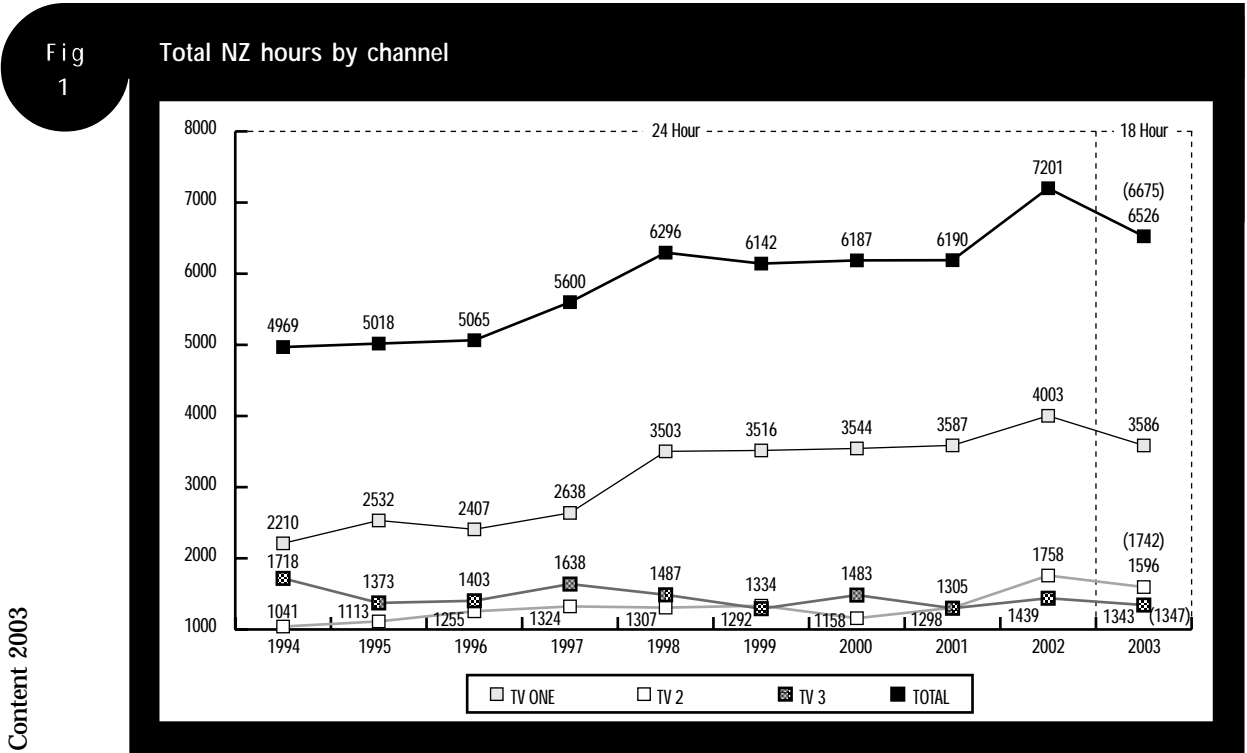
- Screened 3586 hours of local content (24 hour), taking it back to its 2001 levels (following a one-off 2002 increase as a result of sports coverage of the Commonwealth Games, Winter Olympics and Louis Vuitton Cup).
- Screened 54.6% local content for the hours 6am to midnight (60% in 2002)
- Continued to screen more than double the local content hours of both TV2 and TV3.
- Had no significant difference between its 24 and 18 hour results, due to the fact that it screens *BBC World* from 12am - 6am which contains no local content.

TV2

- Total local content hours remained relatively static, at 1742 hours (24 hour clock)
- Screened 24.3 % local content for the hours 6am to midnight (25% in 2002)
- The 24 hour clock total is 146 hours higher than the 18 hour clock total, due to the late night repeats of entertainment shows

TV3

- Total hours dropped by 92 hours (24 hour clock) to reach 1347 (1343; 18 hours).
- Screened 20.4% local content for the hours 6am to midnight (22% in 2002)
- There was only a four-hour difference between TV3's 24 hour total and its 18 hour totals.



Local Content 2003

Figure 2 sets out total hours of New Zealand programming by genre from 1994 to 2003 (comprising first-run and repeats across all three channels). Comments on specific genre variations between years are made in section 8 below.

Fig
2

Total NZ Hours By Genre 1994 - 2003

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Drama/Comedy	283	357	357	336	406	364	386	363	447	372
Children's drama	2	28	12	0	13	9	6	14.5	0	24
Children's	861	745	783	806	600	620	591	488	583	664
Documentaries	207	257	252	269	334	331	242	260	349	355
Information	477	415	867	1147	1485	1191	1041	1272	1322	1232
Entertainment	364	454	302	482	453	496	433	532	703	532
Maori	156	173	218	256	255	287	371	396	387	363
News/Current Affairs	1087	1045	1198	1440	1751	1835	1876	2073	2111	2058
Sports	1531	1545	1077	865	999	1010	1239	791	1299	926
Total NZ Content	4969	5018	5066	5601	6296	6143	6185	6190	7201	6526
% of Schedule	23.2%	19.7%	19.2%	21.3%	24%	23.4%	23.5%	23.6%	27.4%	33%
Total Prime Time	1821	1546	1586	1636	1647	1686	1602	1629	1732	1841
% of Schedule	41.7%	35.4%	36.3%	37.5%	37.6%	38.5%	36.5%	37.2%	39.5%	42%
	24 hour clock									18 hour clock

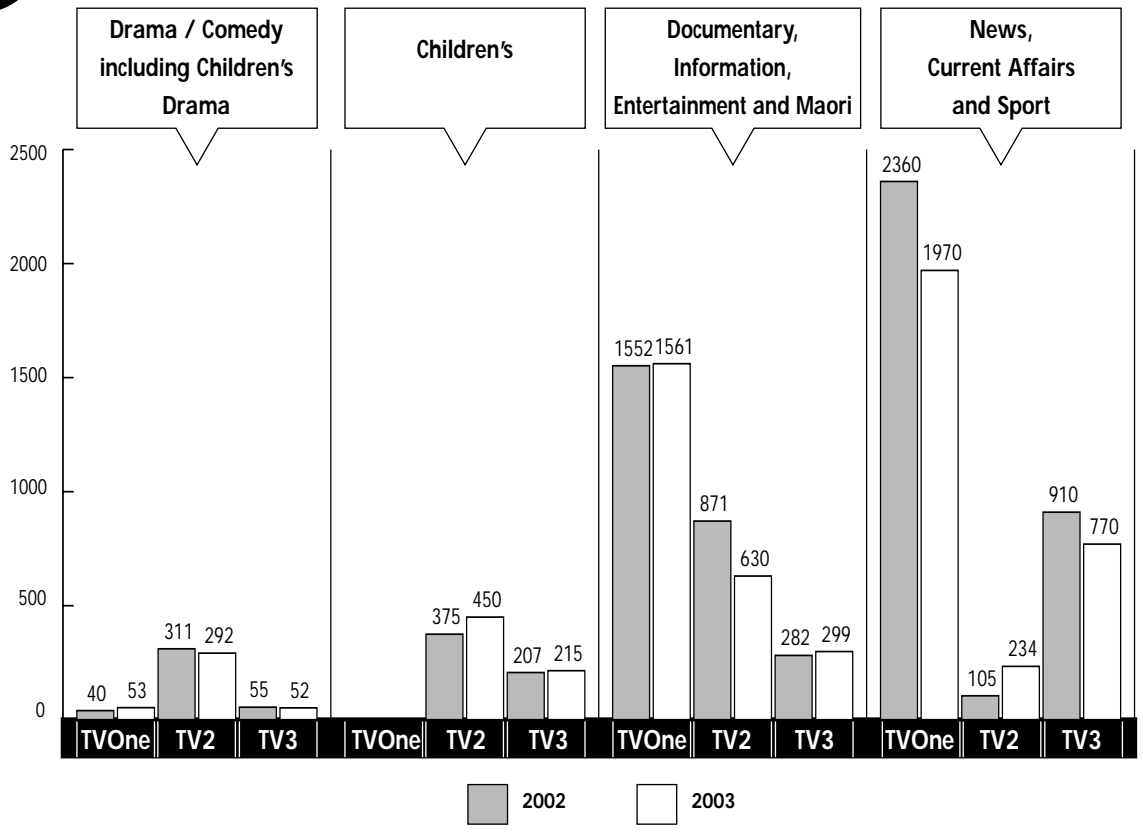
- Notes:
1. These hours are for TVOne, TV2 and TV3 only
 2. Figures have been rounded
 3. Prime time hours for all three channels are calculated as 4380 in total

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

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

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

Fig 3 Local Content Group Genre Groupings (Total Hours)



5

First-run Hours

First-run hours include both prime time (peak) and off-peak programming. First-run hours are an important local content indicator because their levels directly reflect the amount of new investment (both increasing and decreasing) in local programmes. First-run programming is generally not screened between midnight and 6am so there was only a 10-hour difference between the 24 hour clock and the 18 hour clock for this measure. A direct comparison can be made with previous years in figures 4 and 5. The two instances where results differ slightly are indicated in fig. 5.

As figure 3 demonstrates, total first-run hours declined markedly from 2002's high to reach 5171 hours - a 567 hour decline, by the 24 hour clock.

Other than significant decrease in Sports hours, other changes to note in 2003 include:

- First-run Children's hours increased by 84 hours to reach 398, due mainly to the addition of *Sticky TV* on TV3.
- Documentary hours increased by 26, to reach 190 hours in 2003. This was driven by an increase in the first-run hours for this genre on TVOne.
- The other major contributor was a reversal of the 2002 growth in entertainment hours, which declined by 185 hours to reach 419 hours.
- After gaining ground in 2002, first-run Drama/Comedy hours declined by 30 hours to reach 217. This was mainly due to a 33 hour decrease in this genre on TV3.
- The hours of first-run Maori programmes declined by 56, to reach 231. This is the first decrease in first-run programming of this genre since since 1995.
- Children's Drama returned with 13 hours of first-run programming.
- Total first-run News coverage dropped for the first time in at least 8 years.
- NZ On Air's contribution to first-run hours increased 2.6% (to 18.4% of the total).

Fig 4

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

		Drama/Comedy	Children's Drama	Children's	Doco.	Information	Entertainment	Maori	News, CA	Sport	Total
18 Hour	2003	217	398	13	190	920	419	231	1945	838	5171
	2002	247	314	0	164	963	604	287	2013	1157	5748
	2001	205	308	7	197	990	391	295	1992	766	5151
	2000	181	308		168	892	313	256	1876	1188	5182
24 Hour	1999	179	297		229	743	418	196	1835	932	4830
	1998	182	342	13	233	729	313	180	1745	945	4673
	1997	171	367	0	189	772	230	180	1438	864	4211
	1996	201	403	0	187	717	154	165	1186	1055	4068
	1995	224	467	0	206	320	270	127	1032	1545	4191

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

- TVOne screened 43% first-run local content (49.3%) in 2003
- TV2 screened 18.4% first-run local content (19.2%) in 2003
- TV3 screened 17.3% first-run local content (18.8%) in 2003

Excluding News and Current Affairs:

- TVOne screened 26.2% first-run local content
- TV2 screened 17.4% first-run local content
- TV3 screened 9.1% first-run local content

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

Fig
5

First Run Hours (Peak And Offpeak) By Channel

	TV ONE	Drama/Comedy	Children's Drama	Children's	Doco.	Information	Entertainment	Maori	News, CA	Sport	Total
18	2003	34	0	0	116	649	76	154	1344	459	2832
	2002	35	0	0	87	685	54	190	1439	750	3240
	2001	21	0	0	103	832	70	182	1142	423	3071
	2000	5	0	0	91	793	77	163	1347	759	3235
	1999	25	0	0	121	670	74	144	1324	758	3116
24	1998	14		0	132	676	65	140	1328	751	3106
	1997	24		8	108	438	60	146	1002	562	2349
	1996	20		1	121	249	46	122	757	748	2064
	1995	41		28	128	229	131	127	526	1066	2276
	TV2										
18	2003	157	7	263	45	185	291	44	65 (66)	152 (156)	1206
	2002	153		250	33	189	506	47	19	69	1267
	2001	157	1	294	56	61	291	47	8	21	934
	2000	167		271	37	43	205	47	11	20	801
	1999	145		255	48	30	290	48	4	71	889
24	1998	144	13	210	28	25	182	40	0	36	665
	1997	119		198	20	281	125	34	18	121	916
	1996	136		209	9	378	75	44	0	102	953
	1995	135		243	18	7	77	0	89	197	588
	TV 3										
18	2003	26	7	136	30	87	52	34	536	227	1135
	2002	59		64	45	89	45	59	556	338	1242
	2001	28	7	14	38	98	30	67	542	322	1145
	2000	10		37	40	57	31	47	518	409	1149
	1999	10		43	61	43	55	3	507	103	825
24	1998	23		132	73	28	67	0	421	158	902
	1997	28		162	60	52	45	0	418	181	946
	1996	44		193	57	89	33	0	429	205	1050
	1995	49		197	61	85	62	0	417	282	1153

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

TVOne

- First-run local content declined overall by 408 hours, (mainly due to the decline in sports and news hours.)
- Drama/comedy hours remained steady
- There was a 29 hour increase in first-run documentary hours, reaching 116 hours, (the highest level for this genre since 1999).

TV2

- First-run local content decreased overall by 61 hours to reach 1206 hours, due mainly to a decrease in entertainment hours.
- First-run Entertainment hours declined by 215 to reach 291
- First-run Children's hours increased by 13 to reach 263 hours
- First-run Documentary hours increased by 12 to reach 45 hours
- First-run sport coverage continued to increase, up by 83 hours to reach 152 (There were 6 fewer hours between the 18 hour and the 24 hour clock)
- As usual, TV2 stayed well ahead of the other two channels in drama/comedy
- Maori programming remained static
- Children's drama hours reached seven, the first significant appearance of this genre since 1998.

TV3

First-run local content decreased overall on TV3 in 2003

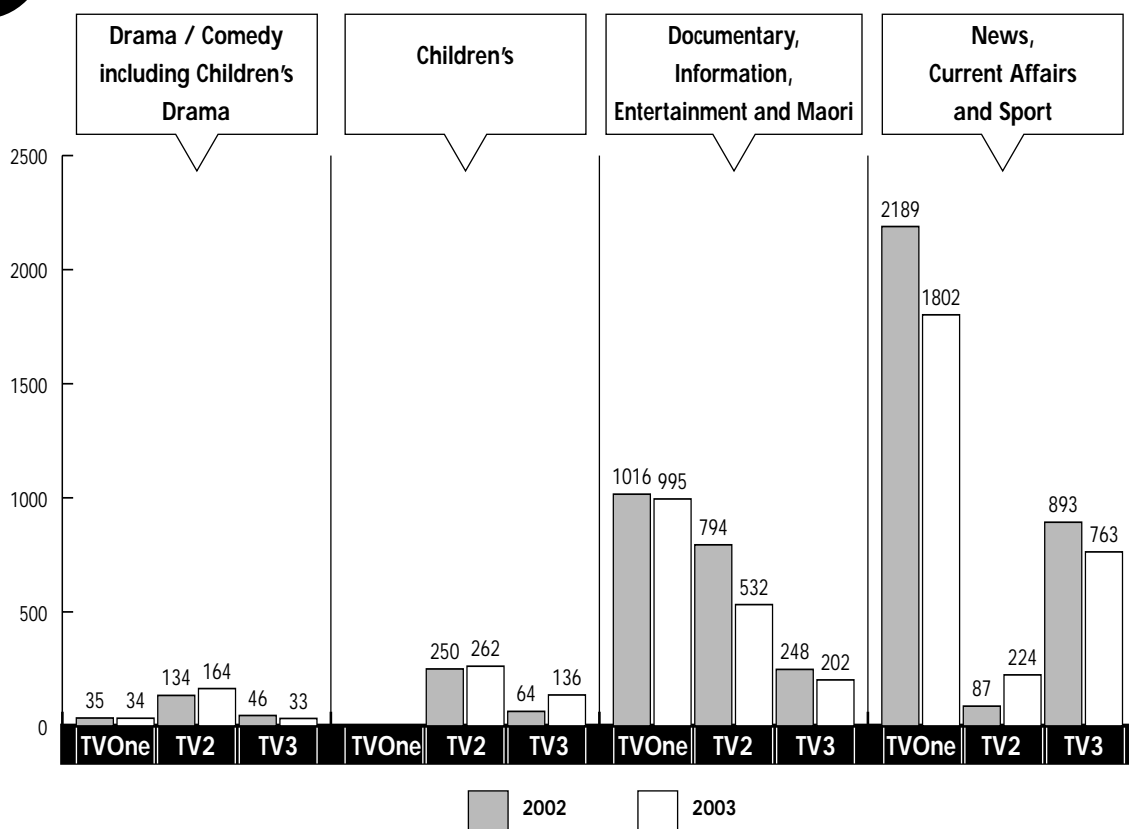
- Children's programmes increased by 72 hours
- Sports hours decreased by 11 to reach 227
- Drama/comedy (down by 33 hours)
- Documentary (down by 15 hours)

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

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

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

Fig 6 Local Content Group Genre Groupings (First Run)



Prime Time Hours

Prime time hours are a useful guide to whether production spending by the television networks is holding its own. As prime time (6pm-10pm) attracts the biggest audience, and consequently the biggest revenue potential, it is logical that the bulk of a network's production budget will be spent on programming in this time band.

As these hours are outside 12am-6am, prime time results are directly comparable whether the analysis is done using the 24-hour or 18-hour clock figures.

Prime time local content hours increased by 6% (from 1743 to 1841). This is the highest measure ever recorded for this survey. (The previous high was 1994 when 1820 hours were recorded). In 2003 local content accounted for 42% of the prime time schedule (39.6% in 2002).

For TVOne the increase in prime time hours was driven mainly by increases in documentary and sports hours. On TV2 the increase was driven by increases in drama/comedy, news and current affairs, and entertainment. Sports was the only area to significantly increase on TV3.

As the total number of prime time hours increases, so does the proportion supported by NZ On Air. In 2003, NZ On Air contributed to 13.2% of local content, compared with 12.5% in 2002.

Prime time local content has increased across all 3 channels As a percentage of their primetime schedules (calculated as 1460 hours per channel):

- TVOne screened 60.3% local content (57.2% in 2002)
- TV2 screened 24.7% local content (20.2% in 2002)
- TV3 screened 41.1% local content (41.4% in 2002)

When News and Current Affairs are excluded:

- TVOne screened 23.8% local content (19.2% in 2002)
- TV2 screened 21.8% local content (19.0% in 2002)
- TV3 screened 13.2% local content 12.8% in 2002).

Detail on each channel follows:

TVOne

- once again screened the most prime time local content of all channels - 880 hours - an increase of 47 hours on 2002.
- increased prime time documentary hours by 31% to reach 106 hours
- despite a decline across the full schedule, primetime sports coverage increased by 57% to reach 79 hours, mainly due to coverage of the Rugby World Cup.

TV2

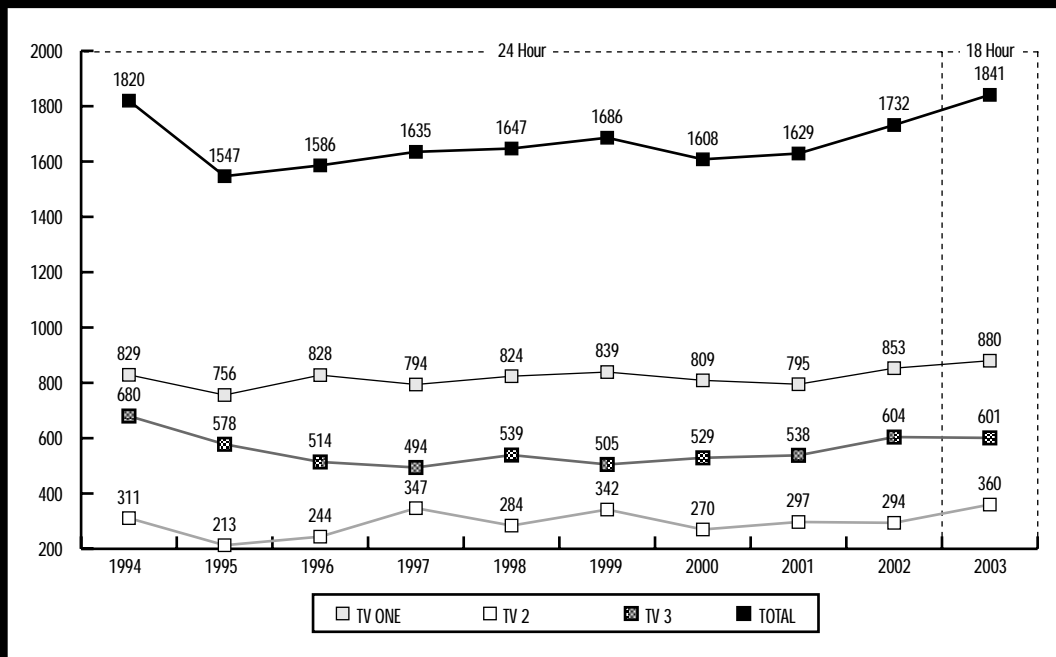
- increased local content in primetime by only 66 hours.
- registered increases in primetime news and current affairs (28 hours), entertainment (23 hours), drama (21 hours) documentaries (9 hours)
- decreased primetime hours in sports (1 hour) and information (11 hours).

TV3

- decreased primetime local content by 3 hours
- increased primetime sports coverage by 35% (22 hours) to reach 88 hours
- Information was the only other primetime genre to increase; by 5 hours to 34 hours.

Fig
7

Prime time hours by channel

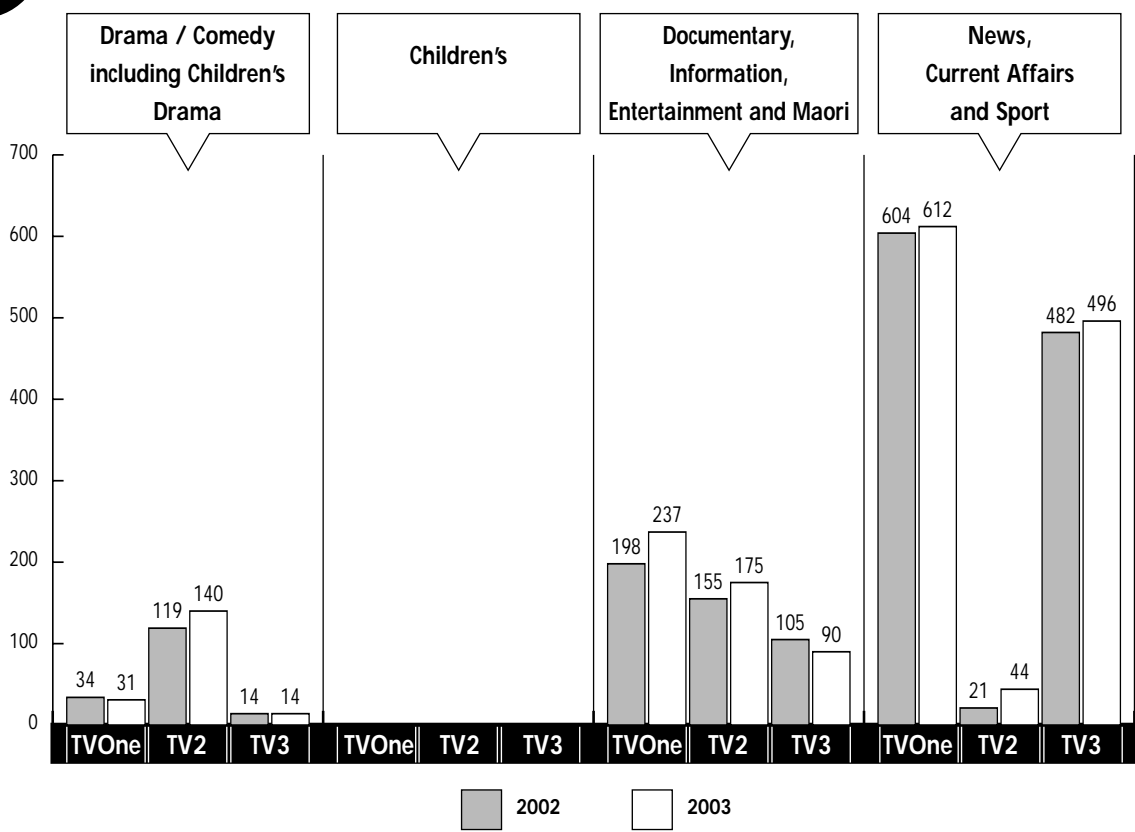


The Local Content Group have decided to measure progress against four genre groups. These are:

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

Prime time results for these genre groupings are as follows.

Fig 8 Local Content Group Genre Groupings (Prime Time)



7

Repeat Hours

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

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

For the 24-hour clock the total number of repeats in 2002 rose by 41 hours to reach 1494. For the period 6am to midnight (the 18 hour clock) the total number of repeats was 1354 in 2003.

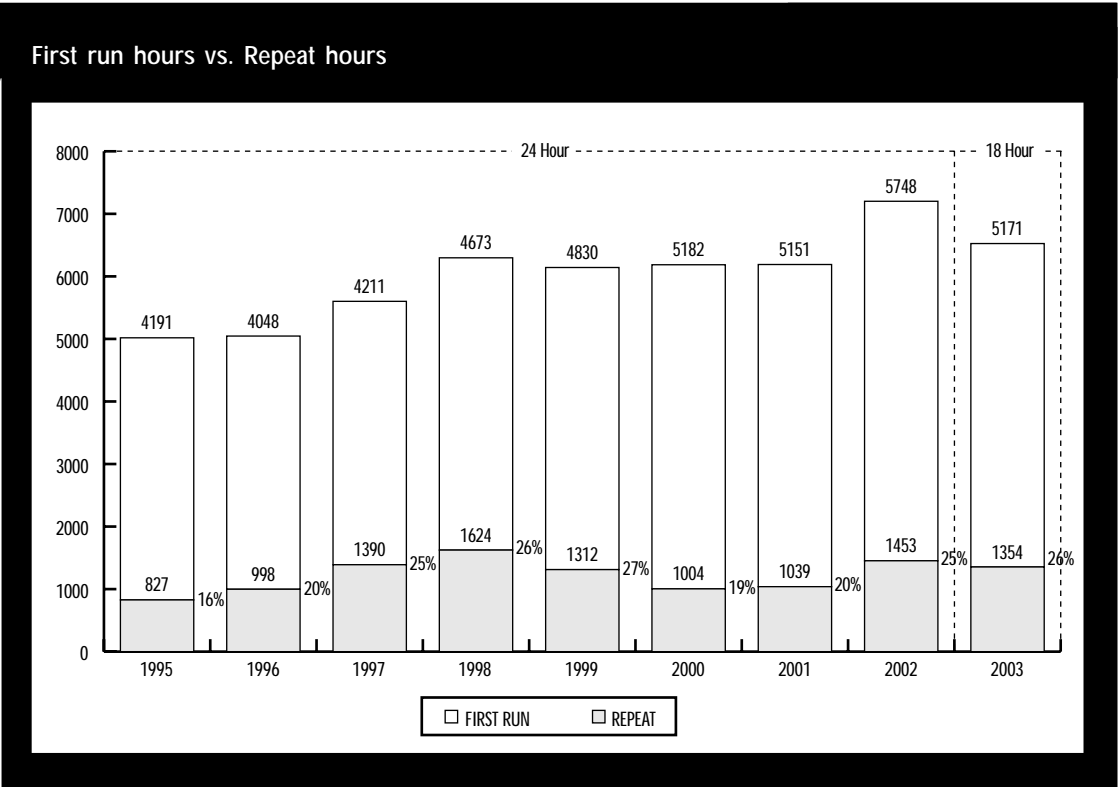
Measured (by the 24-hour clock) as a proportion of first-run hours, repeat programmes rose to 29% compared with 26% for 2002. By the (most watched) 18-hour, 6am-midnight clock, the proportion drops to 26%.

Repeats of Maori programmes increased by 29 hours on TVOne, to bring the total number of repeated Maori programmes to 95. On TV3 repeats of Maori programmes rose from 0 in 2002 to 34 in 2003.

The only other significant change was a 44-hour drop in drama/comedy repeats on TV2 to reach 134 hours, made up mostly of a reduction in *Shortland Street* re-runs.

Fig 9

First run hours vs. Repeat hours



A brief comment on the 2003 trends by individual genre follows. Statistics for each of the nine genres by channel are summarised for the time 6am to midnight (18 hour clock) in Appendix 2. Appendix 2 (a) shows the results for the whole 24 hour period.

Information programming

24 hour clock

The total information hours, across all networks, decreased slightly in 2003 - falling by 19 hours to 1303 hours in 2003.

The decrease was due to a large drop in information programming on TVOne (down by 55 hours to 926. TVOne carries over 70 percent of the total information programming screened.

Most of the TVOne decrease in 2003 was in off-peak programming (down 40 hours), with the loss of *Knowledge Breakfast* coverage and a slightly shorter run of *How's Life* because of the Rugby World Cup coverage. Repeated information programmes on TVOne also decreased in 2003.

Two new information programmes debuted, *Surprise Chef* and *Momentum*. Special interest programmes *Tagata Pasifika*, *Asia Down Under*, *Praise Be* and *Inside Out* all contributed to TVOne's information programming in 2003, as did old favourites *Fair Go*, *Good Morning* and *Taste New Zealand*.

By contrast to the decrease on TVOne, information programming hours increased on both TV2 and TV3.

On TV2, information programming increased by 30 hours, mainly due to an increase in repeats (generally screened off-peak). Prime time information hours were down slightly by 11 hours. New programmes included *Hell's Kitchen* and *Screenshot*. Returning series included *DIY Rescue*, *Dream Home*, *Queer Nation* and *My House My Castle*.

TV3's information programming increased by 7 hours to 109 hours in 2003, with small increases in both the prime time and off-peak schedules. TV3's information programmes in 2003 were *Target*, *Open Door* and rural show *No.8 Wired*.

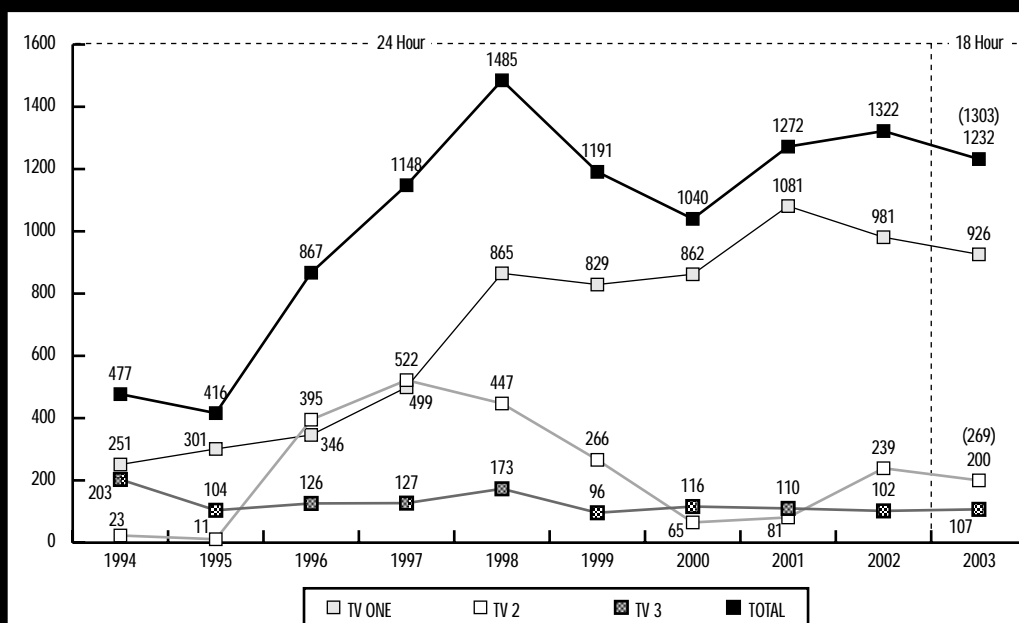
NZ On Air funds some shows in this category, mostly Special Interest programming (*Tagata Pasifika*, *Asia Down Under*, *Praise Be* and *Inside Out* on TVOne, *Queer Nation* on TV2, and *Open Door* on TV3).

18 hour clock

- In total hours there is a 71 hour variation from 24 hour clock results: 1232 hours (18 hour) compared to 1303 hours (24 hour).
- TVOne results are the same for 24 and 18 hour clocks due to screening of BBC World between midnight and 6am (therefore no local content in these hours).
- On TV2 the difference to note is that the repeats figure is lower on the 18 hour clock: 15 hours (18 hour) compared to 83 hours (24 hour), indicating that most TV2 information repeats are screened between midnight and 6am.
- On TV3 there were two fewer hours of repeats by the 18 hour clock than by the 24 hour.

Fig
10

Total NZ information programmes by channel



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

DOCUMENTARIES

24 Hour Clock

Total documentary hours increased by 8 in 2003, to reach 357 hours.

On TVOne total hours increased by 15, mainly due to a 25-hour increase in first-run primetime documentary offset by a decrease in repeats and offpeak.

New programmes in this genre were Maori documentary series *Nga Reo*, *Our New Zealand*, *Intrepid Journeys*, *Give It A Whirl*, *Ski Season*, *Some of My Best Friends Are* and *Coromandel Med*. Programmes returning for another series were *Border Patrol*, *Location, Location, Location*, *Country Calendar*, *Secret New Zealand* and *The Zoo*.

Total documentary hours on TV2 remained almost static. First-run hours increased by 13. This increase was offset by a 14-hour decrease in repeats. *Village People*, *First Division*, *Renters* and *Serious Crash Unit* all debuted in 2003, as did *The Real Strip* and *Police Ten 7*.

TV3 total documentary hours decreased by 5 hours. On TV3, repeats increased by 10 hours, while first-run programmes decreased by 15 hours.

Total documentary hours on TV3 decreased by 5 hours. Documentary series debuting on TV3 were *Quarter Acre Dream*, *The Truth About Money* and *The Filth Files*. Returning series were *Busted* and a 12th series of *Inside New Zealand*.

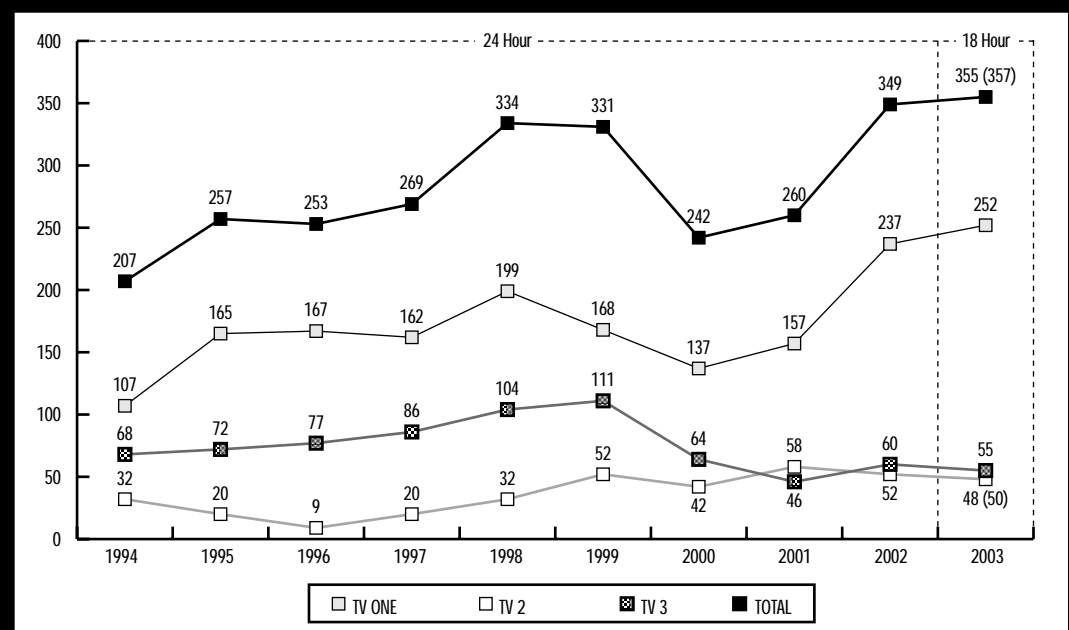
NZ On Air is a substantial supporter of the documentary genre, providing \$8.7 million in the 2002-03 year, contributing to 109 hours of programmes.

18-Hour Clock

TVOne's hours were the same with respect to the 24 hour clock, as were TV3's. TV2 hours differed only by a 2-hour decrease in repeats.

Fig
11

Total NZ documentaries by channel



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

MAORI PROGRAMMING

24 Hour Clock

The total hours of programming made predominantly by Maori for Maori (whether in Te Reo or English) was 396 hours, an 8 hour increase on 2002.

TVOne registered a slight decline in total hours, reducing by 7 hours to reach 249. This was due to a 36 hour decrease in first-run, programmes balanced by a 29 hour increase in repeats.

No new programmes debuted in this genre in 2003. *Waka Huia*, *Marae* and *Te Karere* returned. *Te Karere* was also repeated.

The total hours of Maori programmes on TV2 decreased by 6 (to 79 hours), caused mainly by a decline in offpeak, first-run programmes. Once again, no new programmes debuted in this genre. *Korero Time*, *He Wai*, *Tu Te Puehu* returned.

TV3's total hours recovered ground after a dip in 2002, increasing by 21 hours (to 68). However, this was due mainly to an increase from nil repeat hours in 2002 to 34 in 2003. First-run hours decreased by 13 hours (to 34.)

Programmes to debut on TV3 were reversioned cartoons under the *Nga Paki Waituhi* banner. *Pukana* returned for a fourth series.

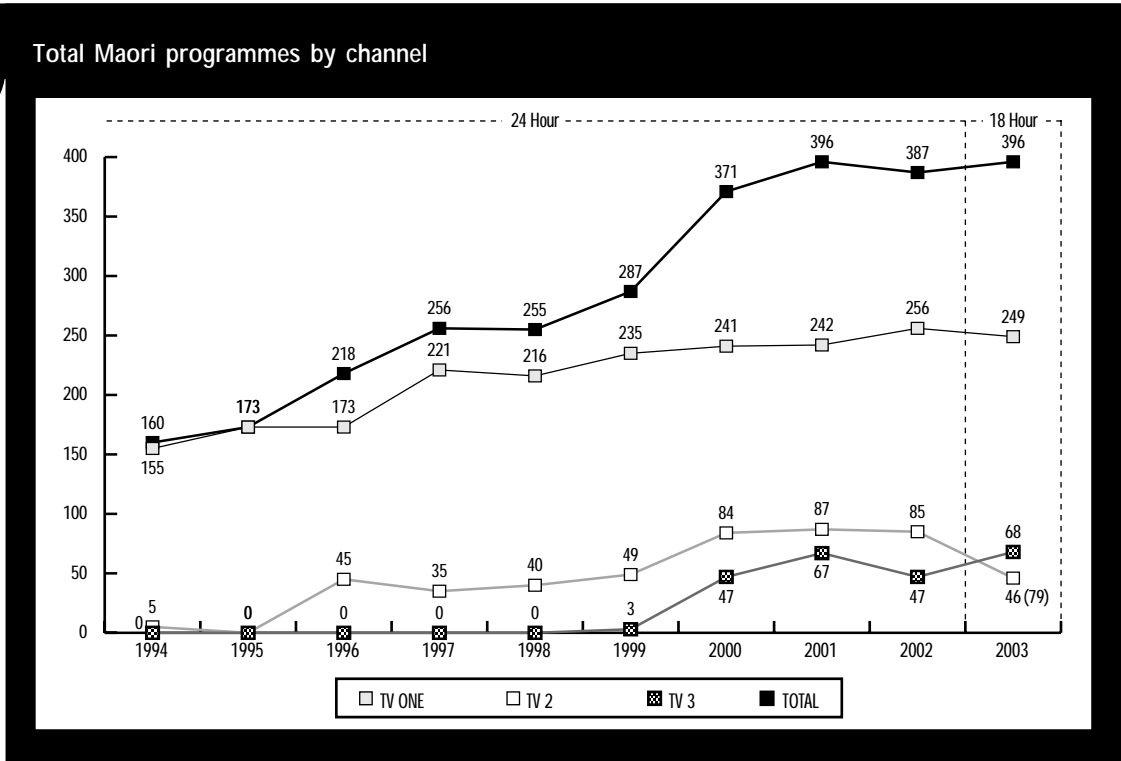
The majority of Maori programming is funded by Te Mangai Paho. All listed programmes screened offpeak. *Mai Time* and *Haka Time*, two Maori programmes of interest to a general audience which includes Maori, were funded by NZ On Air.

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

18 Hour Clock (6am to midnight)

There are no differences in hours for TVOne or TV3 with respect to the 24 hour clock. On TV2, however, repeat hours dropped by 33 to 3.

Fig
1 2



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

CHILDREN'S PROGRAMMES

24 Hour Clock

Total hours of children's programmes increased by 81 hours to reach 664 hours in 2003. This was due mainly to a 75 hour increase on TV2.

No children's programmes screened on TVOne apart from *Tiki Tiki* which, for the purposes of this survey, is counted as a Maori programme.

Again, TV2 was the main provider of children's programming with a total of 450 hours, an increase of 75 hours from 2002. While TV2 saw a small increase in first-run hours, up 12 to 262 hours in 2003, children's repeats increased by 62 hours. It should be remembered that repeats are an important part of the programming mix, particularly for pre-schoolers, who learn through constant repetition. Many children's shows are designed to have a long shelf life so that they may serve emerging audiences.

Children's programmes to debut on TV2 in 2003 were drama series *Hard Out* and *Freaky*. For younger viewers, (NZ-generated) *Saturday Disney* debuted and *TakaPu* and *Party Animals* debuted for pre-schoolers. *WNTV* and *What Now?* returned, as did *Buzz* and *Poppy*.

TV3's total hours increased by 7 hours in 2003, to reach 215 hours. A 71-hour increase in first-run programmes was almost entirely offset by a 64-hour decrease in repeats. The first-run increase was caused by a longer run of *Sticky TV*.

Children's drama series, *Secret Agent Men*, debuted. *Sticky TV*, *Being Eve*, *The Dress Up Box* and *Wannabes* all returned.

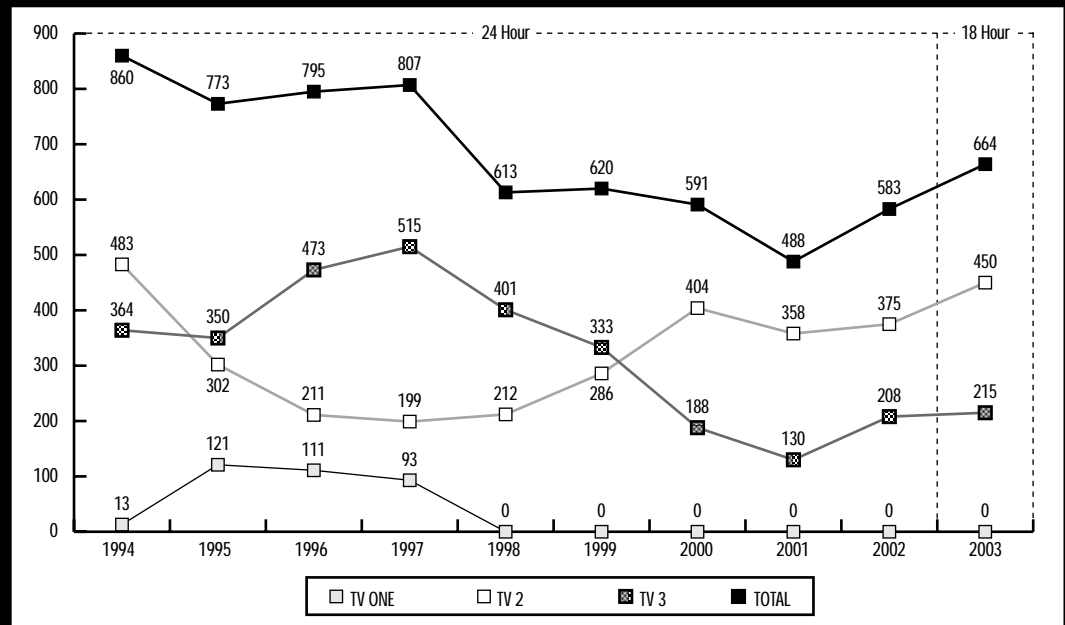
NZ On Air is the main funding contributor to children's and young persons' programming. NZ On Air provided just over \$11 million of funding towards the production of around 436 first-run hours in the 2002-2003 funding year. This compares with \$11.2 million for 372 hours the year before and underscores the point that increases in local content in this genre are heavily dependent on NZ On Air funding. The necessity for off-peak timeslots means that broadcasters will not commission this genre without substantial financial assistance.

18 Hour Clock

For obvious reasons there are no differences between the hours of children's programmes for 6am to midnight versus the 24-hour clock.

Fig
13

Total NZ children's hours by channel



ENTERTAINMENT

24 Hour Clock

After a surge in 2002, total entertainment hours decreased by 192 hours in 2003 to 560 hours. This was mainly due to a drop of 255 hours in TV2 offpeak hours, caused by the cancellation of *M2* in April.

TV2 also saw a 22-hour increase in prime time programming in this genre. Programmes to debut included *DIY Dads*, *Finding J Smith*, *World Famous in New Zealand*, *Mike King Tonight* and *Eating Media Lunch*. Returning programmes included *Space*, *Squeeze*, *RTR* and the two supporting chart shows - *Coca Cola Chart Show* and *Coca Cola New Releases* - as well as *The Mo Show*, *Rockquest*, *Stage Challenge*, *Polyfest* and *Celebrity Treasure Island*.

A 55 hour increase in this genre on TVOne was mostly driven by a 32.5 hour increase in repeat hours. Prime time hours increased by 11 hours, driven by the debut of programmes such as *Big Night In*, *Edwards At Large*, *Home On Their Own* and *Hum*.

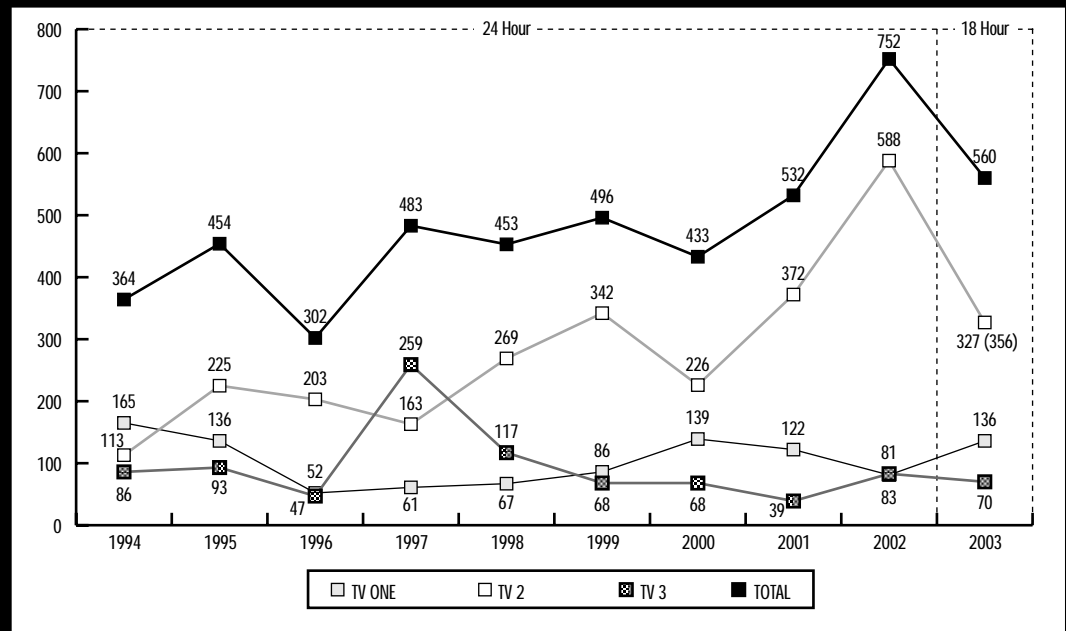
TV3's total hours decreased by 14, mainly due to a 10-hour decrease in prime time entertainment programming. *Home Truths*, *House Dates* and *The Family* debuted. *Most Wanted* and *Pepsi Chart* returned in 2003.

18 Hour Clock

The only difference in this genre with respect to the 24 hour clock was a 28-hour decrease in repeat hours on TV2.

Fig
1 4

Total NZ entertainment hours by channel



NB: The 2002 numbers shown in this graph are higher than last year's numbers due to a categorisation error in the 2002 survey.

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

NEWS AND CURRENT AFFAIRS

24 Hour Clock

In addition to their mainstream programmes, both TVOne and TV3 screen newsbreaks. TV3 runs a 30" newsbreak every hour between 10.30am and 10.30pm. TVOne runs, on average, seven 30" newsbreaks every day. Neither channel's breaks appears in the *Listener*. In previous years a general allocation has been made, due to the fact that the number and duration of these "breaks" changes from year to year, the difficulty in allocating these "breaks" a commercial hour total and allocating them to day periods, and whether they truly constitute first-run or repeat programmes. It has been decided to use this transitional year and not include these "breaks". If they were included, TVOne breaks would comprise around 0.3% of the 6am to midnight schedule, and on TV3 they would comprise around 0.6%.

In 2003 total hours of News and Current Affairs dropped by 52 hours to reach 2059 hours.

The major contributor to this drop was TVOne, where news and current affairs fell by 92 hours (to 1,445 hours), largely due to *Late Edition* being pre-empted by the Rugby World Cup and a four month period where *Midday* screened at half its normal duration. TVOne continued with its early morning *Business News* and *Breakfast* shows. *Face The Nation* and *The Last Word* debuted in 2003, and *Assignment* was discontinued towards the end of the year. The channel's staples continued to be the daily *One News* which runs for a full hour, including weekends, and the weekday *Holmes*, *Late Edition* and *Midday* programmes

TV2's news and current affairs hours increased by 250% in 2003 - rising by 48 hours to 67. This was due to the continuation and expansion of *Flipside* to two shows per day, two days per week.

TV3's hours reduced by 10 to reach 546 in 2003.

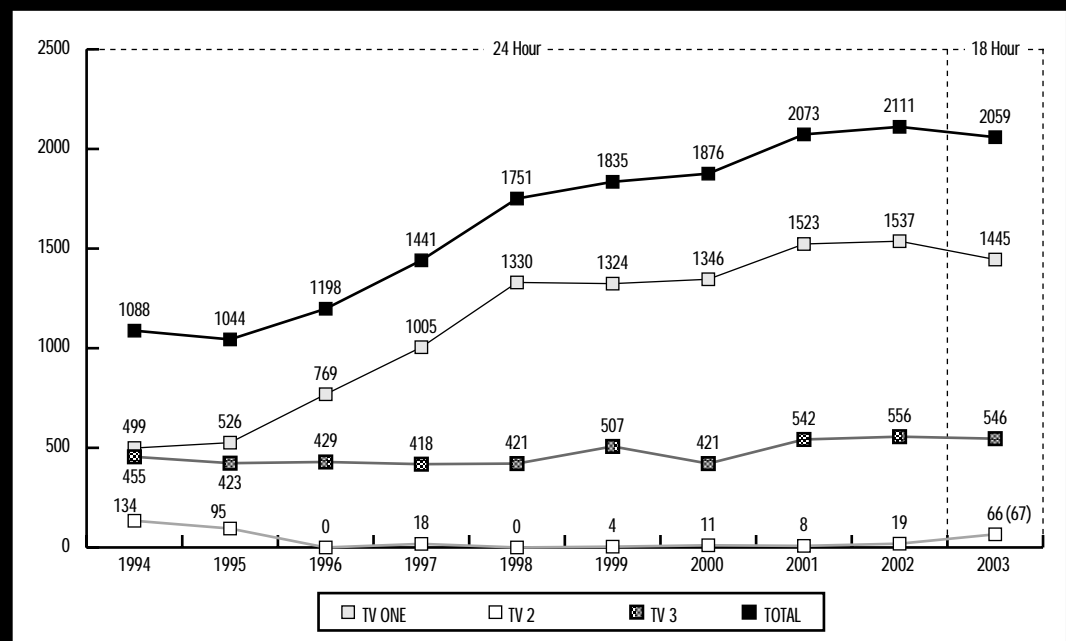
News and current affairs programmes are not normally funded by NZ On Air. *Flipside* is an exception.

18 Hour Clock

The 18 hour clock does not affect TVOne and TV3 news and current affairs totals. TV2's news and current affairs total drops by 1 hour, from 67 hours (24 hour) to 66 hours (18 hour).

Fig 15

Total NZ news & current affairs hours by channel



SPORTS

24 Hour Clock

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

The 2002 local content figures were boosted by coverage of three major sporting events: The Commonwealth Games, Winter Olympics and the Louis Vuitton Cup.

Despite coverage of the America's Cup and the Rugby World Cup in 2003, this did not contribute anywhere near the number of sports hours of the events broadcast in 2002. In 2003 overall total sports hours decreased by 365 hours, mainly due to a 346 hour decrease on TVOne. In addition, TVOne's Saturday afternoon's *Sportzone* which was four hours in duration, was replaced by one hour *Sportzfix* which also had a shorter run.

In contrast, TV2's total sports hours increased by 87 in 2003 to reach 176, due to the debut of basketball coverage on the channel. This included both NBL and Breakers games. There was also an increase in extreme sports coverage with *XS-TV*.

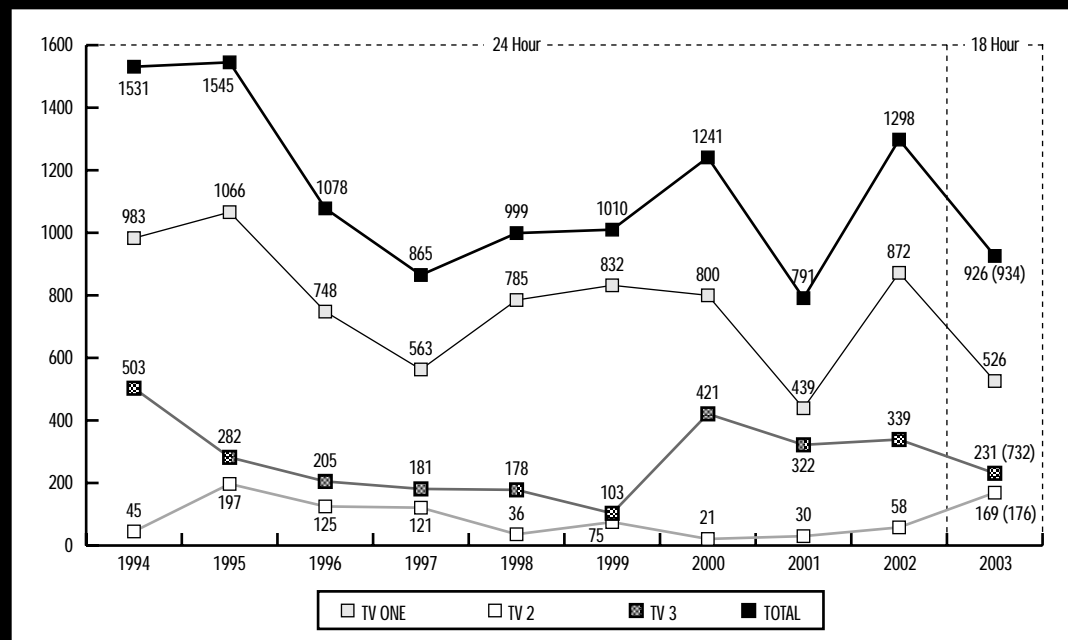
Sports coverage on TV3 declined by 108 hours to reach 231 hours. This was due to the Warriors games moving to Prime TV and a reduction in cricket coverage. In 2002, there were 15 days of Test Cricket coverage whereas in 2003 there were only highlights from the Cricket World Cup.

18 Hour Clock

From 6am to midnight, off-peak sports hours on TV2 decreased by 7, with respect to the 24 hour clock. There were no differences on TVOne and only a 1 hour decrease on TV3.

Fig
16

Total NZ sports hours by channel



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

DRAMA/COMEDY HOURS

24 Hour Clock

Total hours in this genre decreased by 30 in 2003, to 378 hours, largely due to a 20 hour decrease on TV3.

TV2 continues to be well ahead of TVOne and TV3 with *Shortland Street* dominating the TV2 drama output, with daily first-run and repeat screenings. In addition, a fourth 13-part series of *Street Legal* screened and telemovie *Skin & Bone* debuted.

On TVOne, Pacific Island drama *Lima Lelei* screened. Three series returned: *Mercy Peak*, *Spin Doctors* and *Willy Nilly*.

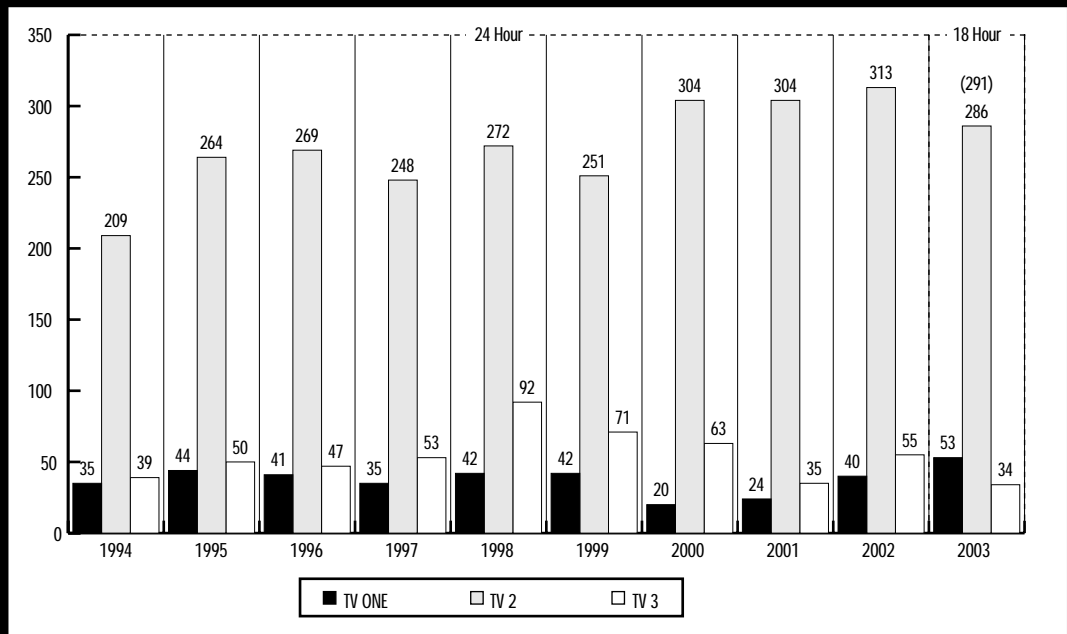
Total drama/comedy hours on TV3 decreased by 20 hours. This was mainly due to no new scripted comedy or short-run drama being commissioned. *The Strip* returned.

18 Hour Clock

On the 18 hour clock, TV2's figures are 5 hours lower than on the 24 hour clock (due to repeats screened between midnight and 6am). There were no other significant differences.

Fig
17

Total NZ drama/comedy hours by channel



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

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

Prime TV, which is now a national broadcaster, is included in this section because its levels of local content as yet remain too low to warrant inclusion into the main body of the report. Prime is making inroads into this and in 2004 will join the Local Content Group.

TV4's local content decreased, due to its closure in October and replacement by C4, from a total of 118 in 2002 to 79 in 2003. C4 has begun with a hiss and a roar, with 176 hours of local content, all in prime time.

Prime's local content hours increased by only 4 to a total of 39 in 2003. Apart from a half-hour documentary on Bright Williams, the last WWI veteran (funded by NZ On Air), Prime's local content consisted of sports events, primarily its coverage of the Warriors league games.

SKY TELEVISION

Figures for local content screened on Sky were collated by Sky. Their breakdown is included as appendix 9. 1010 hours of local sport and 196 hours of entertainment programmes were screened across Sky's channels.

REGIONAL CHANNELS

Since this survey began there has been a burgeoning of smaller regional and community channels. Around 17 such channels now operate, from the Far North to Invercargill.

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

The RTB submits that its members screened 18,633 hours of locally-produced or locally-provided programmes. A locally-provided programme is one purchased from overseas by a local community group, with broadcast time then purchased from the local channel. A locally-produced programme is just as it sounds. 4921 hours of the total are first-run and 13,656 hours are repeats. The Chairman of the RTB says that of the 4921 first-run hours claimed, 3645 are locally produced and 1009 are locally provided, with 225 hours being regional first-run NZ On Air programmes and 42 being Te Mangai Paho-funded regional, first-run programming.

Note:

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

Notes On Methodology

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

9. The categories are:

Drama/Comedy

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

Sports

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

News and Current Affairs

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

Entertainment

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

Children's

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

Children's Drama

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

Maori Programmes

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

Documentaries

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

Information

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