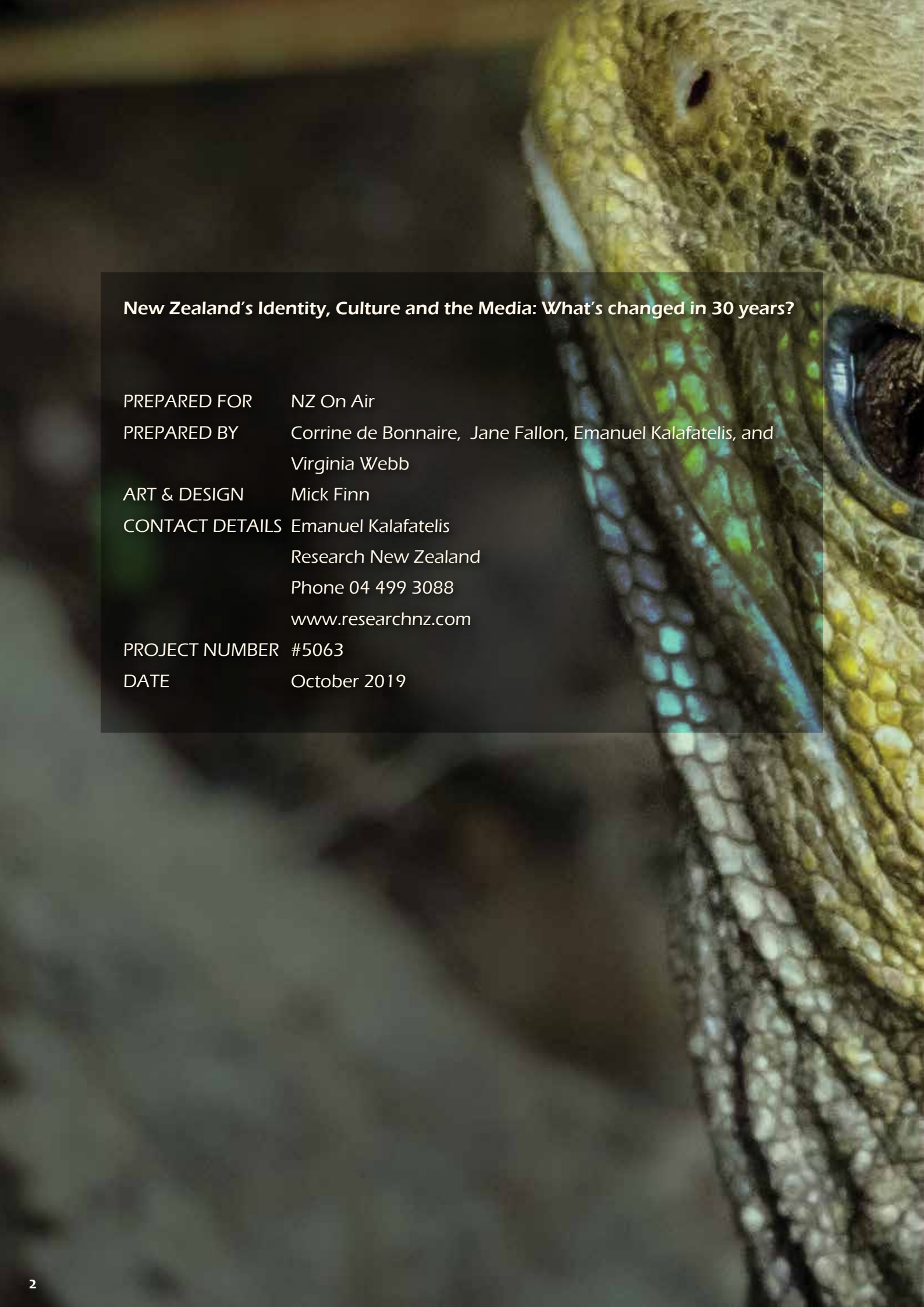


**New Zealand's
Identity, Culture
and the Media**

**What's changed in
30 years?**





New Zealand's Identity, Culture and the Media: What's changed in 30 years?

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Foreword

Thirty years ago, NZ On Air was created to ‘develop the distinctiveness, variety and quality of New Zealand broadcasting that reflects the culture and identity of all New Zealanders under the Treaty of Waitangi’. Today that mission is as important as ever.

In the past 30 years, the mix of peoples that make up Aotearoa has hugely expanded, and so too has the choice and variety of media platforms and content available to us all.

In order to do our job well, NZ On Air needs to understand what’s important to New Zealanders, and also how the changing media offering is affecting the way New Zealanders access and enjoy local stories and songs.

We commissioned this research to sit alongside our ongoing data-driven series *Where Are The Audiences?* We hope the insights in this research will help us, and the creative community we work with, to reflect New Zealanders as we are today – a diverse multi-cultural people with a range of views and needs.

For our part, we will think deeply about the findings as we map our future strategy. We will challenge ourselves and the creatives and platforms we fund to find new and exciting ways to engage New Zealanders with quality public media.

Ā tātou kōrero, ō tātou reo. Our stories, our voices.

Dr Ruth Harley, CNZM
Chair, NZ On Air



Executive|summary

NZ On Air was established in 1989. In that year, it commissioned a population survey about what New Zealanders thought about themselves and their country in order to inform its strategic direction.

This year, to mark its 30th anniversary and to acknowledge the significant population-based, socio-economic, political, technological and media-related changes that had occurred in the interim period, NZ On Air decided to commission a similar survey. This report outlines the results of that survey.

The specific objectives of the survey were to:

- identify and comment on what New Zealanders **currently** think about themselves and their country
- identify and comment on any **changes** in their beliefs, perceptions and opinions compared with the situation 30 years ago, and thereby
- inform NZ On Air's strategic direction for the foreseeable future.

In addition to focusing on what New Zealanders think about themselves and their country, the survey had another important lens; namely, to:

- establish the extent to which New Zealanders consciously watch and listen to New Zealand-made media and music, and
- identify how to reinforce this behaviour and encourage more New Zealanders to watch and listen to New Zealand-made media and music.

The survey was completed online, between 22 and 30 August 2019, with a nationally-representative sample of n=1,660 New Zealanders, 16 years of age and over.

People who identified as Māori or Pacific were over-sampled, as were young people 16-17 years of age, in order to be able to analyse their results with confidence. Post-interviewing, the dataset was weighted to adjust for this over-sampling.

Results based on the total weighted sample of respondents are subject to a maximum margin of error of plus or minus 2.5% (at the 95% confidence level). This means, for example, that had we found 50% of respondents had blue eyes, we could be 95% sure of getting the same result had we interviewed everyone in the population who was eligible to complete the survey – give or take 2.5%.

The sample was sourced from an online provider. For more detailed information about the survey methodology and the qualitative research that was completed to inform the development of the survey questionnaire please refer to the appendix. A copy of the survey questionnaire, which was developed in collaboration with our client at NZ On Air and informed by the results of the qualitative research, may be viewed in the e-report for this research.

To provide context for the survey results, a literature review was also completed in order to identify the population-based, socio-economic, political, technological and media-related changes that had occurred in the interim period. Excerpts from this review introduce each of the main sections of this report.



A brief overview of what's changed in the last 30 years

Significant changes and developments have occurred in New Zealand in the last 30 years including the following:

Population-based changes and developments (based on 1991 and 2018 Census of Population & Dwellings):

- In 1991, there were 3.33 million New Zealanders. The population is now about 50% larger at 4.80 million.
- While about the same percentage of New Zealanders now live in urban areas as was the case in 1990 (i.e. 85%), significantly more New Zealanders now live in Auckland.

Currently, one in every three New Zealanders lives in Auckland, compared with one in every four in 1991.

- The population has grown older.

In 1991, a little over 10% of the population was 65 years of age and over and now, it's well over 15%. The median age in 1991 was 31 years and now it is 38 years.

- In 1991, 16% of the population was born overseas. This is now 30%.

The majority of new immigrants choose to live in the Auckland region and, therefore, 40% of Aucklanders were born overseas (2013).

- While people of UK and European ethnicity still account for the majority of New Zealanders born overseas, people of Asian ethnicity represent the fastest growing ethnic group of the population.

Their numbers have more than quintupled in the last 30 years. As a percentage of the total population, Asian people have now surpassed people of Pacific ethnicity and represent just over 15% of the population. Two-thirds of Asian people live in Auckland (2013).

Overall, there are 177 different ethnicities living in New Zealand and as such, New Zealand is the fifth most ethnically diverse country in the OECD.

Political changes and developments:

- In 1990, New Zealand had a voting system based on a First Past the Post (FPP) system. Now it has a Mixed-Member Proportional (MMP) representation system.

Technological changes and developments:

- In 1990, very few households owned a computer (estimated to be less than 10%). In 2013, almost three-quarters (72%) of all adult New Zealanders owned or had access to a laptop or notebook for their private use and 51% a tablet such as an iPad.
- However, at 70% penetration, smartphones have become the 'device of choice' and 86% of smartphone owners use them to connect to the internet.
- The internet was unknown in 1990, given that the world wide web was not invented until 1991 and New Zealand's first website (at Victoria University of Wellington) was created in 1992. In 2018, 79% of households in New Zealand had access to the internet.

Media-related changes and developments:

- Directly related to the technological changes and developments, the most significant media-related development is the advent of digital media and the impact this has had on traditional broadcast media. Consumers now have many alternatives and spread their time across a range of devices, viewing (and making) content or listening to music from a variety of different platforms and sources, as well as playing games online.

At the time of writing this report, some results from the 2018 Census of Population and Dwellings were not available. Therefore, results from the 2013 Census have been used.

Key results

There are 10 key survey findings:

1. Despite the changes that have occurred in the demographic profile of the New Zealand population, New Zealanders see themselves in much the same way as they did 30 years ago.

Overall, New Zealanders see themselves as a nation of sport-minded people who are friendly, genuine and straight up.

2. Our Māori culture is seen as an important part of our national identity.

Although many New Zealanders believe Māori culture gives New Zealand its unique identity, relatively few consider New Zealand is just a bi-cultural society, drawing only from Māori and Pākehā cultures.

3. New Zealanders embrace our cultural diversity.

Importantly, New Zealanders' beliefs about cultural diversity are significantly different from what they were 30 years ago.

Most state they like New Zealand because it's made up of people from many different cultures and significantly more now agree with this statement than in 1990.

Furthermore, while many agree there isn't enough understanding between different cultures and religions in New Zealand, fewer now express this sentiment.

However, many also agree that people in New Zealand are more racist than they think they are. In fact, many state that, in the last 12 months, they have personally experienced discrimination because of their ethnicity, culture, and religion.

4. New Zealanders are troubled about some important environmental and social issues.

Most New Zealanders say they have a strong feeling for nature and the land, agreeing that one of the good things about New Zealand life is its open spaces, as well as the fact that New Zealand's natural environment is its most precious asset. This has not changed in the last 30 years.

Many also state that climate change is a big

concern for New Zealanders and in this regard, many also agree that New Zealanders are not doing enough to protect the environment.

In addition to these environmental concerns, many New Zealanders are concerned by the increasing gap between the rich and the poor. Only one-in-every two agree that everyone can have a good standard of living. Compared to the situation 30 years ago, significantly fewer now agree with this expectation.

5. Less than one-half of New Zealanders believe that New Zealand-made (television, radio and online) content currently shapes and reflects our national identity.

Most New Zealanders believe our representative sports teams **currently** shape and reflect our identity as New Zealanders. In comparison, relatively few believe this is also the case with regard to New Zealand-made (television and online) content.

When asked to identify what is the 'most important' aspect that **should** shape and reflect our identity, our representative sports teams are again identified as the most important, but also identified as important are our performing arts, cultural rituals, and New Zealand films.

Significantly few identify New Zealand television programmes and New Zealand radio as being an important contributor to national identity.

New Zealanders largely select their radio based on music/information taste. Few actively seek out New Zealand music, with most who do being in the younger age group.

6. While many New Zealanders are conscious of watching New Zealand-made content, about one-quarter specifically watch it because it reflects and informs their view of our cultural and national identity.

A little over one-half of respondents stated they had either watched a New Zealand-made TV/online programme (excluding the news, sport, homemade video, or ads) on their most recent viewing occasion or had done so recently.

When respondents who had watched New Zealand-made content were asked their main reasons for doing so, approximately one-half (or one-quarter of the total sample) stated it was because, ‘it captured who we are as New Zealanders, including our humour’, ‘there is something special about seeing familiar New Zealand places and faces and hearing New Zealand accents’, and/or that they ‘like learning about New Zealand and New Zealanders’.

7. Other New Zealanders watch New Zealand-made TV/online programmes because they are high quality, enjoyable, informative and entertaining.

It is of note that these are the same reasons why others are **not watching** New Zealand-made content. That is, these respondents consider overseas-made content to be of better quality, more interesting, and appealing.

Furthermore, some of those not watching New Zealand-made content also state that New Zealand-made programmes do not reflect the New Zealand they want to identify with, while others state there are not enough programmes relating to their age, culture, or in their language. Most of these respondents are also critical of the number of ad breaks in New Zealand TV programmes.

8. However, even New Zealanders who do not watch New Zealand-made content believe it is important to have New Zealand-made content available.

That is, despite the fact that they are not watching New Zealand-made content and the reasons they give for this, a little over one-half agreed, in principle, that it is important to have ‘access to TV shows about NZ and New Zealanders’.

9. With changes, more New Zealanders would be open to watching New Zealand-made content.

Three particular types of changes would encourage more New Zealanders to start watching or watch more New Zealand-made content; changes which result in programmes being produced that they like; changes which result in these programmes being available on the services they use; and if they are able to watch these programmes ad free.

While many not watching New Zealand-made content currently watch Free-to-view TV, it should be noted that they are above average in terms of their use of streaming services and online videos. While this survey also identifies their programmes of choice as being dramas, documentaries, current affairs, and comedies, we do not know in detail what makes one of these programmes a programme that they like.

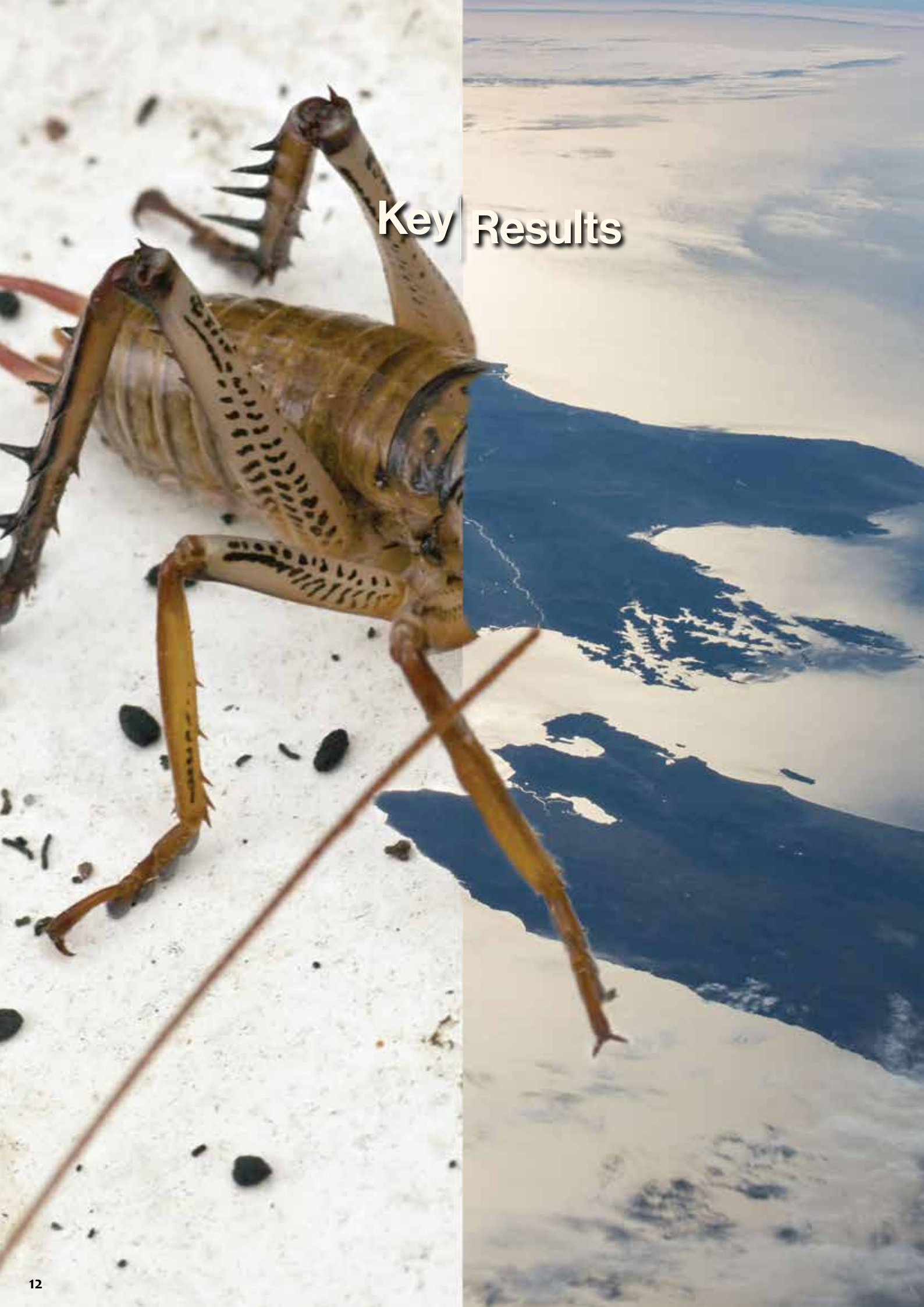
10. Finally, New Zealanders expect the news media to keep them informed about international and national affairs and issues, and to do so with a high level of integrity.

However, respondents expressed a degree of uncertainty about a number of important issues; including the accuracy of reported news, whether it was reported in order to entertain rather than inform, and whether it was opinion-based rather than factual.

In summary, only one-in-every two respondents agreed that they, ‘trust New Zealand news media’s reporting’, while one-in-every three stated that, ‘news reporting in New Zealand is too biased’.



Key Results



Key result 1 | Our national identity has evolved, but it is fundamentally the same as it was 30 years ago

Perceptions of New Zealand's geographical isolation have changed over time. Thirty years ago, survey respondents saw our isolation as supporting resourcefulness and independence, but also as a barrier to trade. Young people, especially, felt that we were culturally backward, slow and unexciting.

Now, our remoteness has new meaning. Our isolation makes us distinctive and different, an exclusive destination where it is possible to get away from everyday routines and enjoy an 'untouched world'. Geographical distance, insularity and remoteness have been reconfigured as integral, valued parts of our national profile.¹

(Excerpt from literature review)

New Zealanders see themselves as a nation of sports-minded people who are friendly, genuine and straight up

Respondents were asked to agree or disagree with a number of statements describing New Zealanders.

Some of these statements were statements that were asked in 1990 and, therefore, we compare the results for these statements in this section of the report. Others were developed as a result of the qualitative research that was completed to inform the development of this year's survey.



Figure 1 shows that, above all else, most respondents stated that New Zealanders are friendly people, who are genuine and straight up, and love their sport:

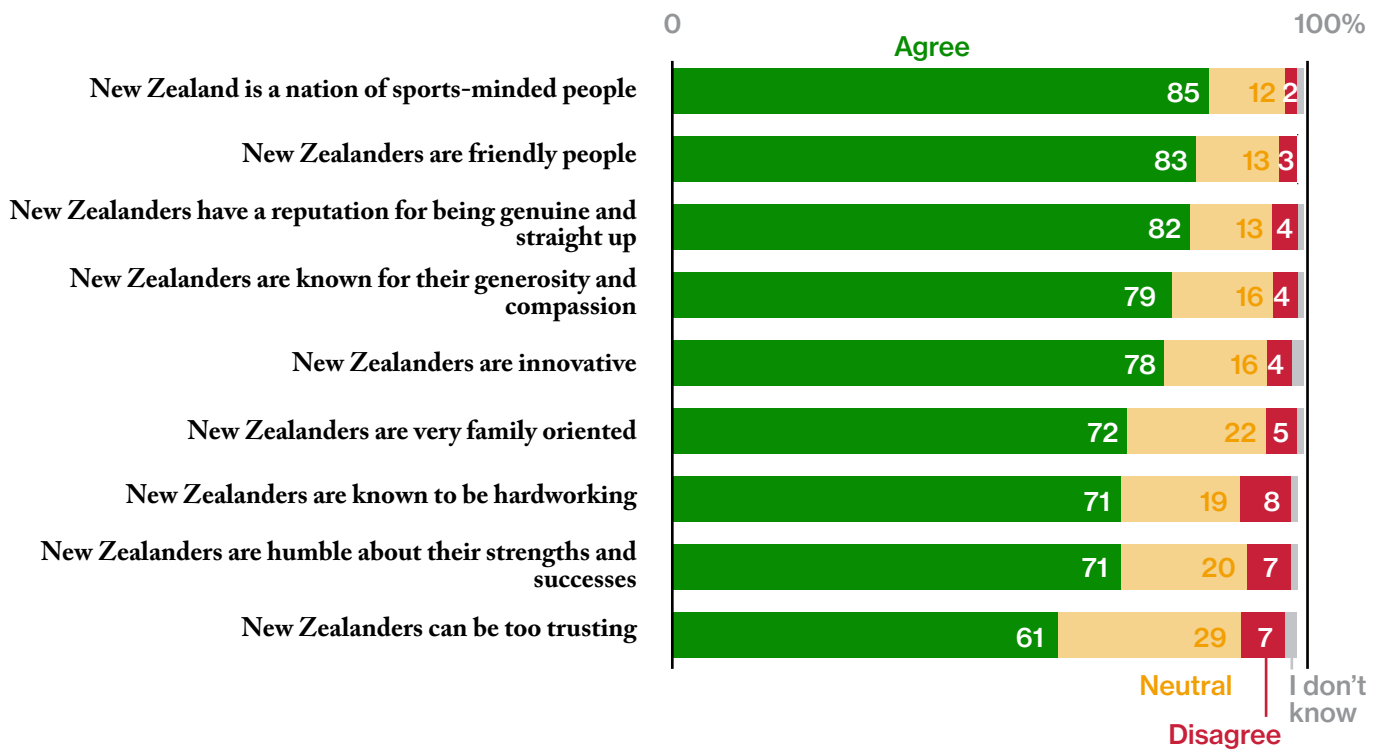
- In fact, these three statements were agreed by over 80% of respondents:
 - ‘New Zealand is a nation of sports-minded people’ (agreed by 85% of all respondents).
 - ‘New Zealanders are friendly people’ (83% agreement).
 - ‘New Zealanders are friendly people’ (83% agreement).

- ‘New Zealanders have a reputation for being genuine and straight up’ (82% agreement).

- In comparison, the statement that was least agreed with, but was still agreed by nearly two-thirds of respondents (61%) was, ‘New Zealanders can be too trusting’.

Where comparisons are possible between the results of this year’s survey and the results of the 1990 survey, the general conclusion is that

Figure 1: Agreement-disagreement with statements about New Zealanders



“New Zealanders are quite real compared with people from overseas. We are down to earth, easy going and sports mad”

European New Zealander, 16 years, Female, AKL

Table 1: 1990-2019 Comparison – Agreement with statements about New Zealanders

	2019	1990
	Total	Total
Base =	1,660	1,000
	%	%
New Zealand is a nation of sports minded people	85	82
New Zealanders are friendly people	83	83
New Zealanders have a reputation for being genuine and straight up	82	NA
New Zealanders are known for their generosity and compassion when it comes to helping those in need	79	NA
New Zealanders are innovative	78	75
New Zealanders are very family oriented	72	NA
New Zealanders are known to be hardworking	71	56
New Zealanders are humble about their strengths and successes	71	NA
New Zealanders can be too trusting	61	57

The base numbers shown are unweighted counts.
Results shown are based on the percentage agreeing with each statement.

respondents’ perceptions of New Zealanders are similar. For example, this is the case for, ‘New Zealand is a nation of sports-minded people’ (85% for 2019 and 82% in 1990) and ‘New Zealanders are friendly people’ (83% for 2019 and 83% in 1990) (Table 1).

However, there are also some notable differences, with a significantly greater percentage of respondents this year agreeing

with two statements:

- ‘New Zealanders are known to be hardworking’ (71% in 2019 compared with 56% in 1990).
- ‘New Zealanders are innovative’ (78% in 2019 compared with 75% in 1990).

“I think we are pretty easy going, we are kind, generous and hardworking ”

European New Zealander, 64 years, Male, CHC

Differences by age

The following commentary is based on an analysis of the results by six age groups; namely, the young (16-17 and 18-24), respondents in their formative years (25-34 and 35-49), respondents in their pre-retirement years (50-69), and older respondents (70 years and over). Table 2 shows that:

- Regardless of age group, all respondents **generally agreed with all the statements**.
- However, the table also shows that there is a positive relationship between the level of agreement with each statement and increasing age:
 - For example, 94% of respondents aged 70 years and over agreed that, ‘New Zealanders are a sports-minded people’ compared with 74% for respondents who are aged 16-17 and 78% for those aged 18-24.
 - Although younger respondents were less likely to agree with each statement compared with older respondents, this was because they tended to provide a neutral response, neither agreeing nor disagreeing, rather than disagreeing outright. There are two exceptions to this:
 - ‘New Zealanders are known to be hardworking’ (16% disagreed).
 - ‘New Zealanders can be too trusting’ (15% disagreed).

Table 2: Agreement-disagreement with statements describing New Zealanders, by age

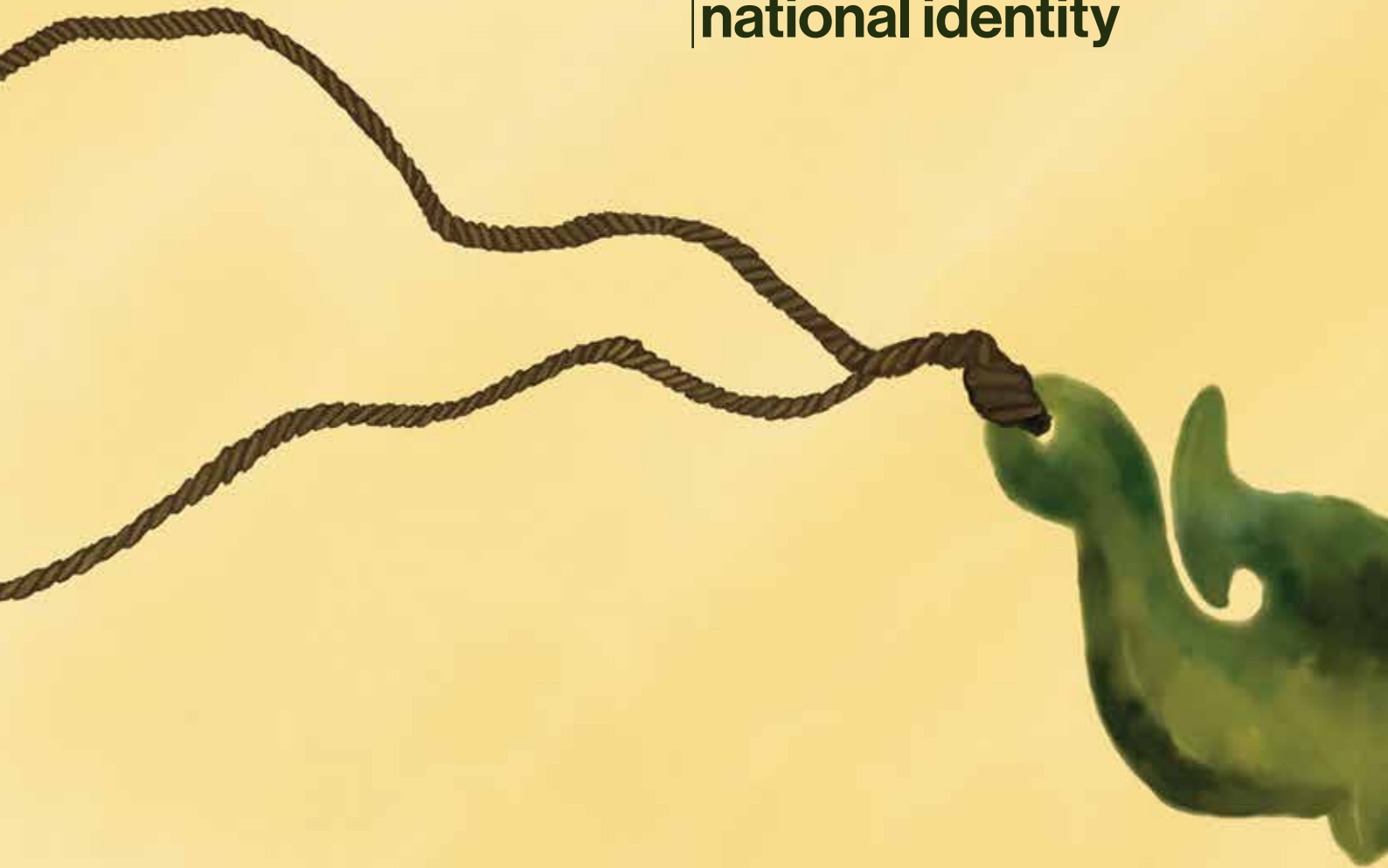
	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
New Zealand is a nation of sports minded people							
Agree	85	74	78	79	85	89	94
Neither agree nor disagree	12	20	16	15	12	10	5
Disagree	2	2	3	3	2	1	0
Don't know	1	2	0	2	1	1	1
New Zealanders are friendly people							
Agree	83	78	76	80	84	86	94
Neither agree nor disagree	13	18	19	15	13	11	5
Disagree	3	2	6	4	3	2	0
Don't know	0	2	0	1	0	0	0
New Zealanders have a reputation for being genuine and straight up							
Agree	82	76	73	81	80	86	90
Neither agree nor disagree	13	11	18	12	15	11	6
Disagree	4	8	6	5	4	2	3
Don't know	1	5	2	2	0	1	1

Table 2: Agreement-disagreement with statements describing New Zealanders, by age (continued)

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
New Zealanders are known for their generosity and compassion when it comes to helping those in need							
Agree	79	69	69	74	78	84	90
Neither agree nor disagree	16	25	21	18	18	12	10
Disagree	4	4	7	6	3	3	0
Don't know	1	2	2	2	1	1	0
New Zealanders are innovative							
Agree	78	64	66	72	75	87	87
Neither agree nor disagree	16	29	25	17	19	10	11
Disagree	4	4	7	7	5	2	0
Don't know	2	4	2	2	1	2	2
New Zealanders are very family oriented							
Agree	72	69	70	70	70	74	74
Neither agree nor disagree	22	22	25	20	24	21	23
Disagree	5	4	4	8	6	5	2
Don't know	1	5	1	1	1	1	2
New Zealanders are known to be hardworking							
Agree	71	63	70	63	70	75	79
Neither agree nor disagree	19	16	18	23	21	18	17
Disagree	8	16	8	12	9	6	2
Don't know	1	4	3	1	1	1	1
New Zealanders are humble about their strengths and successes							
Agree	71	65	68	71	74	74	68
Neither agree nor disagree	20	25	26	20	18	17	25
Disagree	7	6	5	9	8	8	7
Don't know	1	4	1	1	1	1	1
New Zealanders can be too trusting							
Agree	61	55	50	56	59	70	76
Neither agree nor disagree	29	27	38	31	32	23	27
Disagree	7	15	10	10	9	5	4
Don't know	2	4	2	3	1	2	2

The base numbers shown are unweighted counts.
Total may not sum to 100% due to rounding.

Key results 2 and 3 | **New Zealanders embrace cultural diversity, while also acknowledging Māori culture as an important part of their national identity**



Migration and demographic change are clearly changing New Zealand's identity, but some of the most significant cultural changes since the 1990 research have developed domestically. One notable change has been the political and cultural resurgence of Māori, which is evident in the revival of te reo Māori. Increased use of te reo in Parliament, schools and in broadcast media is an example of how normalised use of the language has become². Māori understandings of identity, belonging, and citizenship influences our collective national identity.³

Māori culture sets New Zealand apart from other nations; it makes us distinct. However, while attitudes and public recognition of kaupapa Māori have changed since the 1990 research, the diversity of Māori identities can be obscured by media portrayal of Māori as an homogenous, disadvantaged group⁴. This stands in contrast to the national pride expressed in Māori symbols such as the haka and the koru⁵, which have significant symbolic value for New Zealand.⁶

... New Zealand has long been described as 'ethnically diverse' with a rich mix of cultures and languages and a vibrant indigenous culture, but we are now described as 'superdiverse'.⁷

As well as describing the ethnic makeup of a country, the term 'superdiverse' describes new levels and complexity of diversity. Superdiversity can be seen in the various threads that make up our identities such as ethnicity, language, religion, age and places of residence. Superdiversity also describes the rich links between different communities within New Zealand and the ties they have with communities elsewhere⁸. New Zealand is the fifth most ethnically diverse country in the OECD.^{9,10}

(Excerpt from literature review)

Our Māori culture is seen as an important part of our national identity

Figure 2 shows that most respondents (68%) agreed that, 'Māori culture gives New Zealand its unique identity'. However, with this in mind, relatively few considered New Zealand to be a 'bi-cultural society, drawing only from Māori and Pākehā cultures' (23% agreement).

In fact, almost twice as many respondents (46%) disagreed with this statement, while over one-half (54%) also stated that, 'New Zealanders strongly identify as a Pacific nation'.

In comparison, over two-thirds of respondents (69%) agreed with the statement, 'I like New Zealand because it's made up of people from lots of different cultures'. Notably, relatively few respondents disagreed (eight percent). Most others responded with a neutral rating (22%).

Although many respondents stated they like New Zealand because it is a multi-cultural society, over one-half (55%) agreed that, 'there isn't enough understanding between different cultures and religions in New Zealand'. Once again, relatively few respondents disagreed

(13%) and most others responded with a neutral rating (29%).

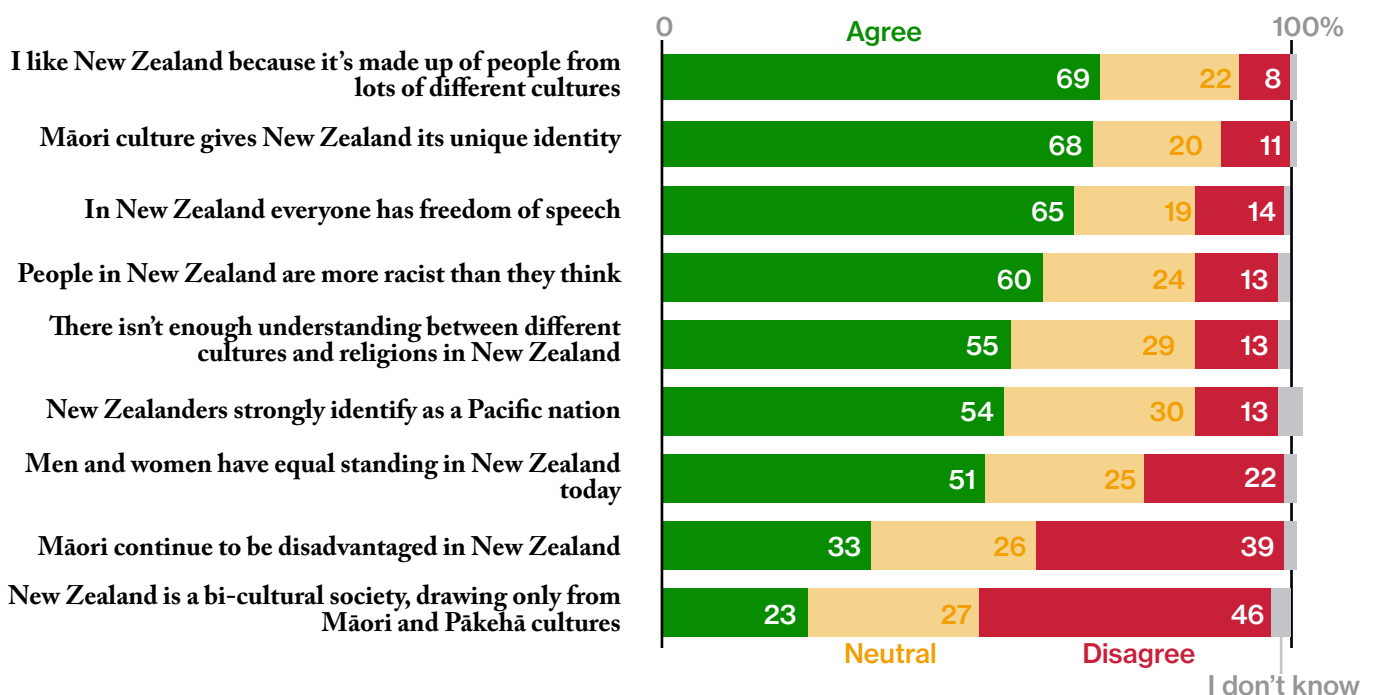
This is an important result given that 60% of all respondents agreed that, 'people in New Zealand are more racist than they think'. Relatively few respondents disagreed (13%) and most others responded with a neutral rating (24%).

The figure also highlights the following results:

- One-half of respondents (51%) agreed that, 'men and women have equal standing in New Zealand today', while 22% disagreed.
- Two-thirds of respondents (65%) agreed that, in 'New Zealand, everyone has freedom of speech', while 14% disagreed.
- One-third of respondents (33%) agreed that 'Māori continue to be disadvantaged in New Zealand'. A greater percentage (39%) disagreed with this statement and 26% responded with a neutral response.

There are a number of significant differences between this year's results and the results for the 1990 survey, including the fact that more respondents this year agreed that, 'Māori culture gives New Zealand its unique identity'

Figure 2: Agreement-disagreement with statements about New Zealand society



(68% in 2019 compared with 61% in 1990) (Table 3):

- Notwithstanding this, a significantly greater percentage of respondents this year agreed with the statement, ‘I like New Zealand because it’s made up of people from lots of different cultures’ (69% in 2019 compared with 58% in 1990).
- Significantly fewer respondents this year agreed that, ‘there isn’t enough understanding between different cultures and religions in New Zealand’ (55% in 2019 compared with 74% in 1990) and perhaps because of this, slightly fewer respondents this year agreed that, ‘people in New Zealand are more racist than they think’ (60% in 2019 compared with 64% in 1990).
- Significantly more respondents agreed that, ‘men and women have equal standing in New Zealand today’ (51% in 2019 compared with 42% in 1990).

Differences by age

Regardless of age, most respondents agreed to more or less the same extent that they, ‘like New Zealand because it’s made up of people from lots of different cultures’. However, they also agreed to more or less the same extent, that ‘there isn’t enough understanding between different cultures and religions in New Zealand’ (Table 4).

Respondents aged 25-34 and those aged 70 years and over were the most likely to agree with the statement that, ‘New Zealanders are more racist than they think’ (both 64% compared with 55% for respondents aged 16-17, for example).

Younger respondents aged 16-17 were also less likely than older respondents to agree that, ‘Māori culture gives New Zealand its unique identity’. Sixty-one percent of these respondents agreed with this statement, compared with 74% for respondents aged 18-24 and those aged 25-34 (76%).

Table 3: Comparison – Agreement with statements about New Zealand society

	2019	1990
	Total	Total
Base =	1,660	1,000
	%	%
I like New Zealand because it’s made up of people from lots of different cultures	69	58
Māori culture gives New Zealand its unique identity	68	61
In New Zealand, everyone has freedom of speech	65	68
People in New Zealand are more racist than they think	60	64
There isn’t enough understanding between different cultures and religions in New Zealand	55	74
New Zealanders strongly identify as a Pacific nation	54	NA
Men and women have equal standing in New Zealand today	51	42
Māori continue to be disadvantaged in New Zealand	33	NA
New Zealand is a bi-cultural society, drawing only from Māori and Pākehā cultures	23	NA

The base numbers shown are unweighted counts. Results shown are based on the percentage agreeing with each statement.

Respondents aged 18-24 were also the most likely to state that, 'New Zealand is a bi-cultural society, drawing only from Māori and Pākehā cultures' (33% compared with 17% for respondents aged 16-17, 17% for those aged 50-69, and 16% for those aged 70 years and over).

Experiencing discrimination

In the previous section, we reported that 60% of respondents agreed that, 'people in New Zealand are more racist than they think'. Related to this, we asked respondents whether they had personally experienced any discrimination in the last 12 months for any reason, including their culture, ethnicity and religion.

Table 5 shows that over four in every 10 New Zealanders experienced some form of discrimination in the last 12 months:

- Most frequently, 18% stated they had experienced discrimination because of their age.
- However, this is closely followed by 17% who stated they had experienced discrimination because of their ethnicity, their dress or appearance (13%), their culture (11%), and/or their religion (six percent).

“Every New Zealander is proud of it [Māori culture] and its part of everybody”

Taiwanese New Zealander, 47 years, Female, AKL

Table 4: Agreement-disagreement with statements about New Zealand society, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
I like New Zealand because it's made up of people from lots of different cultures							
Agree	69	69	67	71	71	67	70
Neither agree nor disagree	22	20	22	20	22	23	25
Disagree	8	9	10	8	7	9	4
Don't know	1	2	2	1	0	0	1
Māori culture gives New Zealand its unique identity							
Agree	68	61	74	76	69	64	58
Neither agree nor disagree	20	24	17	13	19	21	31
Disagree	11	11	6	10	11	14	11
Don't know	1	4	2	1	1	0	0
In New Zealand, everyone has freedom of speech							
Agree	65	55	60	69	66	68	68
Neither agree nor disagree	19	29	25	17	19	17	20
Disagree	14	15	13	13	15	15	11
Don't know	1	2	2	1	2	0	1

Table 4: Agreement-disagreement with statements about New Zealand society, by age (continued)

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
People in New Zealand are more racist than they think							
Agree	60	55	60	64	58	61	64
Neither agree nor disagree	24	20	26	20	25	23	25
Disagree	13	20	11	14	16	13	9
Don't know	2	5	3	2	2	3	2
There isn't enough understanding between different cultures and religions in New Zealand							
Agree	55	55	55	56	53	54	61
Neither agree nor disagree	29	24	28	28	30	29	29
Disagree	13	14	11	13	15	15	8
Don't know	2	7	5	2	1	2	1
New Zealanders strongly identify as a Pacific nation							
Agree	54	39	45	47	53	59	67
Neither agree nor disagree	30	27	35	30	29	31	23
Disagree	13	19	12	18	14	9	9
Don't know	4	16	9	5	3	2	1
Men and women have equal standing in New Zealand today							
Agree	51	49	46	57	53	48	50
Neither agree nor disagree	25	25	34	21	23	24	29
Disagree	22	19	15	21	22	28	21
Don't know	2	7	4	2	1	1	0
Māori continue to be disadvantaged in New Zealand							
Agree	33	27	42	43	37	24	27
Neither agree nor disagree	26	29	31	20	26	25	27
Disagree	39	34	21	33	36	50	46
Don't know	2	9	6	5	2	1	0
New Zealand is a bi-cultural society, drawing only from Māori and Pākehā cultures							
Agree	23	17	33	27	27	17	16
Neither agree nor disagree	27	31	32	27	28	22	29
Disagree	46	42	29	42	42	59	54
Don't know	3	11	6	5	3	2	1

The base numbers shown are unweighted counts.
Total may not sum to 100% due to rounding.

Differences by age

Respondents at the younger end of the age spectrum (i.e. under 35 years age) were more likely than older respondents to state they had experienced discrimination in the last 12 months. This was especially in relation to their:

- Ethnicity (e.g. 28% of respondents aged 25-34 compared with two percent of those aged 70 years and over).
- Dress or appearance (e.g. 23% of respondents aged 18-24 compared with two percent of those aged 70 years and over).
- Culture (e.g. 19% of respondents aged 18-24 compared with one percent of those aged 70 years and over).
- Religion (e.g. nine percent of respondents

aged 18-24 compared with two percent of those aged 70 years and over).

Younger respondents were also more likely to state they had experienced discrimination in the last 12 months because of their age, but this was also the case for older respondents. Younger respondents were also more likely to state they had been discriminated because of their gender.

Table 5: Personal experience of discrimination, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
Age	18	24	26	15	9	25	17
Ethnicity	17	20	24	28	20	13	2
Dress or appearance	13	18	23	16	14	10	2
Gender	12	15	22	19	13	6	5
Culture	11	15	19	12	12	10	1
Income	10	4	12	13	11	12	3
Religion	6	9	9	8	7	5	2
Sexual orientation	4	4	8	8	4	2	1
I have not experienced any form of discrimination in the last 12 months	55	42	38	43	56	60	79
Prefer not to say	3	5	7	4	3	2	1

The base numbers shown are unweighted counts.
Totals may exceed 100% due to multiple response.

Key result 4 | New Zealanders are troubled by some important environmental and social issues

As well as playing a role in global fora such as the United Nations, New Zealand is also experiencing the effects of global trends such as rising inequality, tight housing markets and climate change. These are threatening some of our most deeply held ideas about ourselves, such as our egalitarianism and pristine natural environment.

People interviewed for the 1990 research described New Zealand as a land of opportunity where everyone has an equal chance. They acknowledged the existence of inequality and poverty, but their belief in egalitarianism was a belief that people could take advantage of opportunities for social mobility and economic advancement to improve their lot¹¹. New Zealand is an equal society in many ways. New Zealand has equal voting rights, a Bill of Rights, and a Human Rights Act that outlaws discrimination on a variety of grounds¹². In other ways, New Zealand has become increasingly unequal. Like most developed countries, the income gap between rich and poor is much larger than it was 30 years ago.¹³

(Excerpt from literature review)



New Zealanders agree that climate change is a big concern for them

Figure 3 shows that most New Zealanders have a strong connection with nature, the land and the open spaces of New Zealand:

- The large majority of respondents agreed that, ‘New Zealanders like me have a strong feeling for nature and the land’ (81%) and as a result, ‘one of the good things about New Zealand life is its open spaces’ (90%). Over one-half of all respondents (52%) gave the best possible rating of ‘strongly agreed’ with the latter statement.
- One-half of all respondents (50%) also gave the best possible rating of ‘strongly agreed’ for a related statement, ‘New Zealand’s natural environment is its most precious asset’. Overall, 86% of all respondents agreed with this statement.
- Against this background, 72% of all respondents stated that, ‘climate change is a big concern for New Zealanders’, with 60% also agreeing that, ‘New Zealanders are not

doing enough to protect the environment’. Fourteen percent disagreed with this latter statement (i.e. that New Zealanders were doing enough) and 24% responded with a neutral rating.

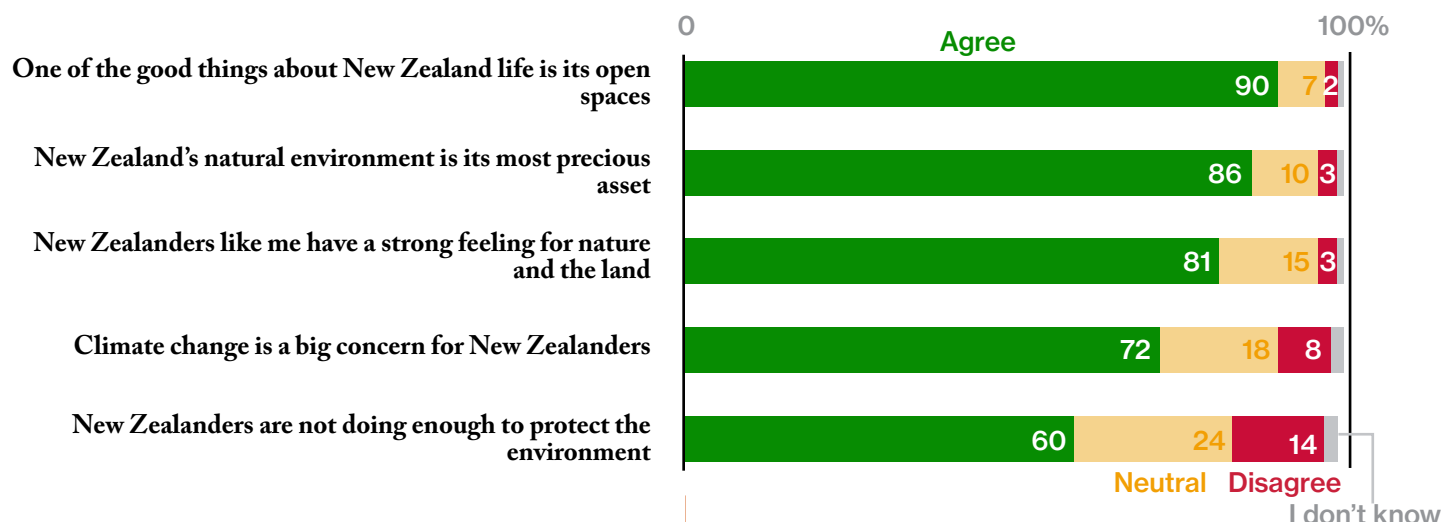
Where comparisons are possible between the results of this year’s survey and the 1990 survey, the general conclusion is that they are similar, with just one exception:

- Significantly fewer respondents this year agreed with the statement, ‘one of the good things about New Zealand life is its open spaces’ (90% in 2019 compared with 95% in 1990) (Table 6).

“ I worry about what New Zealand is going to be like in 30-40 years for my kids. The banning of the plastic bags is a great step, but we have to keep on top of this before it’s too late ”

European New Zealander, 37 years, Male, AKL

Figure 3: Agreement-disagreement with statements about how New Zealanders see the land, the environment and open spaces



Differences by age

Regardless of age group, **all respondents generally agreed with all the statements.** For example, all respondents agreed to more or less the same extent that, 'New Zealand's natural environment is its most precious asset'. Similarly, all respondents agreed to more or less the same extent that, 'New Zealanders are not doing enough to protect the environment' and that, 'climate change is a big concern for New Zealanders' (Table 7).

However, older respondents were more likely than younger respondents to state that, 'New Zealanders like me have a strong feeling for nature and the land' (85% of respondents aged 70 years and over compared with 73% of those aged 16-17 and 76% of those aged 18-24). Older respondents were also more likely to state that, 'one of the good things about New Zealand life is its open spaces' (96% of respondents aged 70 years and over compared with 87% of respondents aged 16-17 and 81% of those aged 18-24).

New Zealanders' concerns about social issues

Respondents were asked to agree or disagree with a number of statements about living in New Zealand, including some statements about social issues. Figure 4 shows that the large majority of respondents agreed that, 'social problems ... like suicide, poverty and homelessness are a concern' (86% agreement). Reflecting this result:

- Seventy-one percent also agreed with the statement, 'the increasing gap between the rich and the poor in New Zealand is a concern'. Relatively few respondents disagreed (seven percent) and most others responded with a neutral rating (19%).
- In the same vein, less than one-half of respondents (48%) agreed that, 'in New Zealand, everyone can have a good standard of living'. Twenty-seven percent of respondents disagreed with this statement and 24% responded with a neutral rating; a total of 51%.

Table 6: 1990-2019 Comparison – Agreement with statements about how New Zealanders see the land, the environment and open spaces

	2019	1990
Base =	Total 1,660 %	Total 1,000 %
One of the good things about New Zealand life is its open spaces	90	95
New Zealand's natural environment is its most precious asset	86	88
New Zealanders like me have a strong feeling for nature and the land	81	79
Climate change is a big concern for New Zealanders	72	NA
New Zealanders are not doing enough to protect the environment	60	NA

The base numbers shown are unweighted counts.
Results shown are based on the percentage agreeing with each statement.

Table 7: Agreement-disagreement with statements about how New Zealanders see the land, the environment and open spaces, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
One of the good things about New Zealand life is its open spaces							
Agree	90	87	81	86	90	93	96
Neither agree nor disagree	7	7	14	9	7	6	3
Disagree	2	4	4	3	2	0	1
Don't know	1	2	1	1	1	1	0
New Zealand's natural environment is its most precious asset							
Agree	86	82	82	85	88	87	87
Neither agree nor disagree	10	13	11	9	10	10	11
Disagree	3	4	4	3	1	2	1
Don't know	1	2	3	2	1	0	0
New Zealanders like me have a strong feeling for nature and the land							
Agree	81	73	76	80	81	81	85
Neither agree nor disagree	15	16	19	16	14	16	13
Disagree	3	5	4	3	4	2	1
Don't know	1	5	2	1	1	0	0
Climate change is a big concern for New Zealanders							
Agree	72	65	71	74	75	69	70
Neither agree nor disagree	18	18	17	16	17	21	19
Disagree	8	7	8	8	5	8	10
Don't know	2	9	3	2	2	2	2
New Zealanders are not doing enough to protect the environment							
Agree	60	58	59	62	60	59	59
Neither agree nor disagree	24	24	25	21	24	26	24
Disagree	14	12	14	15	14	13	15
Don't know	2	5	2	3	2	2	3

The base numbers shown are unweighted counts.
Total may not sum to 100% due to rounding.

- However, just over two-thirds of respondents (71%) agreed that, ‘in New Zealand, everyone has an opportunity to succeed if they work at it’. Thirteen percent of respondents disagreed with this statement, while 17% responded with a neutral rating.
- Relatedly, 32% of respondents agreed that, ‘there are too many immigrants coming to New Zealand and taking our jobs’. A greater percentage of respondents disagreed with this statement (37%), while 29% responded with a neutral rating.

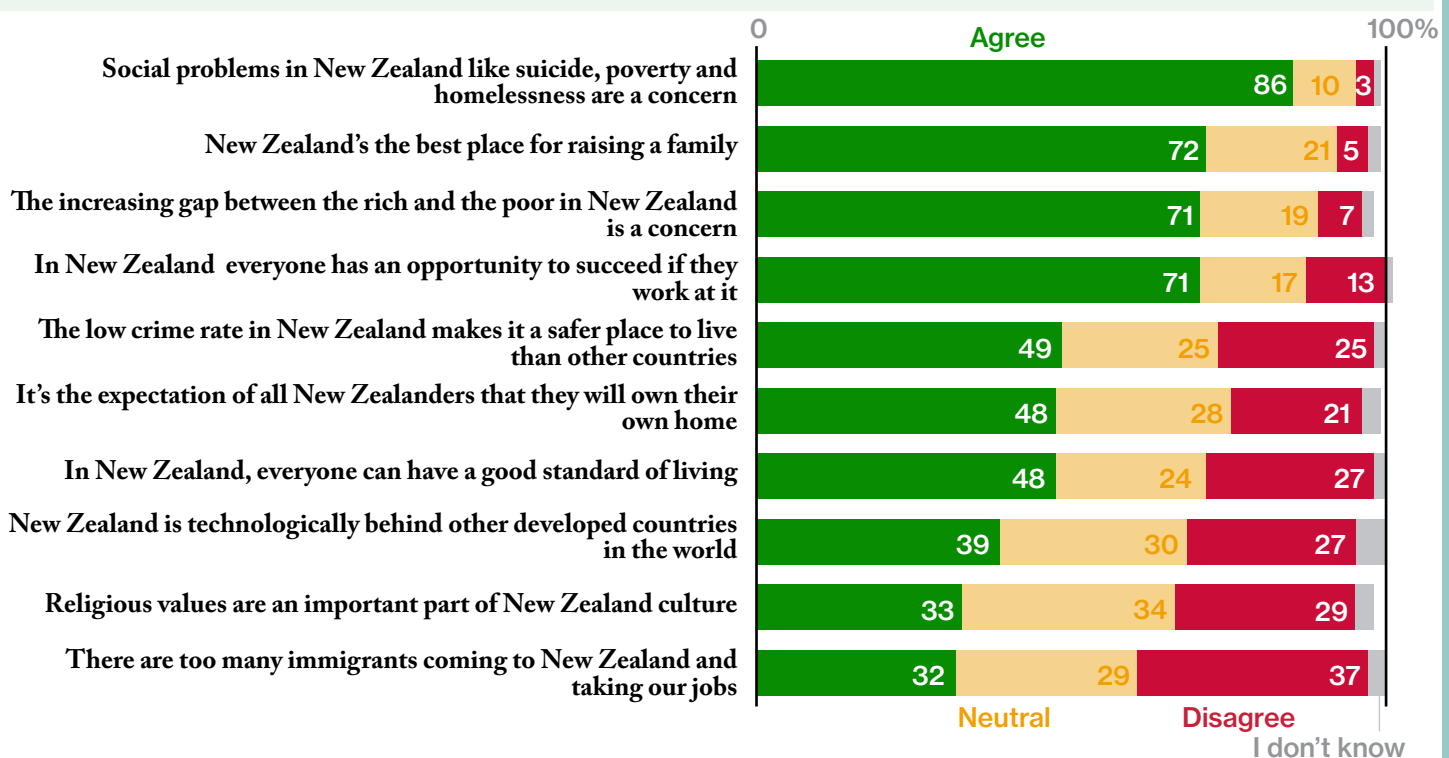
Other results of social importance include:

- Reflecting current trends, less than one-half of respondents (48%) agreed that, ‘it’s the expectation of all New Zealanders that they will own their own home’. Twenty-one

percent disagreed with this statement and 28% responded with a neutral rating; a total of 49%.

- Despite this result for housing, 72% of respondents agreed that, ‘New Zealand’s the best place for raising a family’. Relatively few respondents disagreed with this statement (five percent), although 21% responded with a neutral rating.
- Almost one-half of respondents (49%) agreed that, ‘the low crime rate in New Zealand makes it a safer place to live than other countries’. However, 25% disagreed with this statement and 25% responded with a neutral rating.
- Over one-third of respondents (39%) felt that, ‘New Zealand is technologically behind

Figure 4: Agreement-disagreement with statements about social issues and concerns in New Zealand



other developed countries in the world'. Twenty-seven percent disagreed with this statement and 30% responded with a neutral rating.

- Finally, one-third of respondents (33%) agreed that 'religious values are an important part of New Zealand culture'. However, a similar percentage (29%) disagreed and 34% responded with a neutral rating.

Table 8 shows that there are a number of significant differences between the results of this year's survey and the 1990 survey in terms of respondents' opinions about current issues and concerns. For example:

- Although the statements, 'social problems in New Zealand like suicide, poverty and homelessness are a concern' and 'the increasing gap between the rich and the poor in New Zealand is a concern' were not asked in 1990, note that a related statement, 'in New

Zealand, everyone can have a good standard of living', was asked in both years.

- This year, significantly fewer respondents agreed that everyone can have a good standard of living compared with the percentage agreeing in 1990 (48% and 59% respectively).
- Similarly, note that this year, fewer respondents agreed with the statement, 'in New Zealand everyone has an opportunity to succeed if they work at it (71% and 81% respectively), as was the case with the statement, 'it's the expectation of all New Zealanders that they will own their own home' (48% and 80% respectively).
- Notwithstanding these results, in both 1990 and 2019, the same percentage of respondents agreed with the statement, 'New Zealand's the best place for raising a family' (72% in both years).

Table 8: 1990-2019 Comparison – Agreement-disagreement with statements about social issues and concerns in New Zealand

	2019	1990
	Total	Total
Base =	1,660	1,000
	%	%
Social problems in New Zealand like suicide, poverty and homelessness are a concern	86	NA
New Zealand is the best place for raising a family	72	72
The increasing gap between rich and the poor in New Zealand is a concern	71	NA
In New Zealand everyone has an opportunity to succeed if they work at it	71	81
The low crime rate in New Zealand makes it a safer place to live than other countries	49	40
It's the expectation of all New Zealanders that they will own their own home	48	80
In New Zealand, everyone can have a good standard of living	48	59
New Zealand is technologically behind other developed countries in the world	39	NA
Religious values are an important part of New Zealand culture	33	39
There are too many immigrants coming to New Zealand and taking our jobs	32	42

The base numbers shown are unweighted counts. Results shown are based on the percentage agreeing with each statement.

- Significantly more respondents in 2019 also agreed that ‘the low crime rate in New Zealand makes it a safer place to live than other countries’ (49% in 2019 and 40% in 1990).
- Other significant changes include a lower percentage of respondents agreeing that:
 - ‘Religious values are an important part of New Zealand culture’ (33% in 2019 and 39% in 1990).
 - And on a final positive note, a lower percentage of respondents agreeing that, ‘there are too many immigrants coming to

New Zealand and taking our jobs’ (32% in 2019 and 42% in 1990).

Differences by age

Table 9 shows that there are significant differences by age. While well over one-half all age groups agreed that, ‘social problems in New Zealand like suicide, poverty and homelessness are a concern’, older respondents were more likely to agree with this statement than younger respondents. For example, 87% of respondents aged 50-69 and 92% of those aged 70 years and over agreed compared with 78% of respondents aged 16-17 and 84% of those aged 18-24. This

Table 9: Agreement-disagreement with statements about social issues and concerns in New Zealand, by age

	Base =	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
		1,660	55	203	296	440	480	186
		%	%	%	%	%	%	%
Social problems in New Zealand like suicide, poverty and homelessness are a concern								
Agree		86	78	84	86	82	87	92
Neither agree nor disagree		10	13	13	9	13	10	6
Disagree		3	2	2	3	3	3	1
Don't know		1	7	2	1	1	0	0
New Zealand's the best place for raising a family								
Agree		72	58	66	69	69	74	83
Neither agree nor disagree		21	24	27	22	23	19	15
Disagree		5	7	5	7	6	5	1
Don't know		2	11	3	3	1	2	0
The increasing gap between the rich and the poor in New Zealand is a concern								
Agree		71	60	63	71	73	72	75
Neither agree nor disagree		19	22	23	17	18	19	17
Disagree		7	6	8	8	8	8	7
Don't know		3	13	6	4	1	1	1

Table 9: Agreement-disagreement with statements about social issues and concerns in New Zealand, by age (continued)

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
In New Zealand everyone has an opportunity to succeed if they work at it							
Agree	71	64	67	62	66	70	82
Neither agree nor disagree	17	15	21	21	18	15	13
Disagree	13	18	11	14	14	14	6
Don't know	1	4	1	2	1	1	0
The low crime rate in New Zealand makes it a safer place to live than other countries							
Agree	49	58	57	56	53	40	38
Neither agree nor disagree	25	15	24	21	22	31	29
Disagree	25	24	16	21	23	28	32
Don't know	2	4	2	2	2	2	1
It's the expectation of all New Zealanders that they will own their own home							
Agree	48	58	44	52	44	46	56
Neither agree nor disagree	28	16	29	23	29	31	31
Disagree	21	17	23	21	25	22	13
Don't know	3	9	5	4	2	2	1
In New Zealand, everyone can have a good standard of living							
Agree	48	46	44	48	47	48	55
Neither agree nor disagree	24	25	35	22	23	23	20
Disagree	27	24	18	28	29	28	23
Don't know	2	5	2	3	1	1	2
New Zealand is technologically behind other developed countries in the world							
Agree	39	46	49	56	41	29	17
Neither agree nor disagree	30	24	28	23	34	30	38
Disagree	27	22	17	16	21	36	42
Don't know	5	9	6	5	4	4	4
Religious values are an important part of New Zealand culture							
Agree	33	38	44	37	31	30	31
Neither agree nor disagree	34	33	28	30	33	39	39
Disagree	29	23	24	29	34	29	27
Don't know	3	5	3	4	2	3	3
There are too many immigrants coming to New Zealand and taking our jobs							
Agree	32	31	36	31	29	35	27
Neither agree nor disagree	29	33	29	25	28	29	31
Disagree	37	31	32	40	39	33	39
Don't know	3	5	3	4	3	2	2

The base numbers shown are unweighted counts.
Total may not sum to 100% due to rounding.

was also the case in relation to a number of other statements; for example:

- ‘The increasing gap between the rich and the poor in New Zealand is a concern’. Seventy-two percent of respondents aged 50-69 and 75% of those aged 70 years and over agreed with this statement compared with 60% of respondents aged 16-17 and 63% of those aged 18-24.
- ‘In New Zealand, everyone can have a good standard of living’ (e.g. 55% of respondents aged 70 years and over compared with 47% of respondents aged 18-24).
- ‘In New Zealand, everyone has an opportunity to succeed if they work at’ (e.g. 82% of respondents aged 70 years and over compared with 62% of respondents aged 25-34).


On the other hand, younger respondents were more sceptical about:

- ‘New Zealand’s the best place for raising a family’ (58% of respondents aged 16-17 and 66% of those aged 18-24 agreed with this statement compared with 74% of respondents aged 50-69 and 83% of those aged 70 years and over).
- ‘New Zealand is technologically behind other developed countries in the world’ (e.g. 56% of respondents aged 25-34 years compared with 17% of respondents aged 70 years and over).


This, however, was not the case in terms of their agreement with the statement that, ‘the low crime rate in New Zealand makes it a safer place to live than other countries’ (e.g. 57% of respondents aged 18-24 years compared with 38% of respondents aged 70 years and over).

“ My worst fears for the future are pollution and poverty, because the gap between the rich and poor is getting bigger ”

Māori New Zealander, 66 years, Female, Wairarapa



Key result 5 | **Less than one-half of New Zealanders believe that New Zealand-made (television, radio and online) content currently shapes and reflects our national identity**



Before the advent of digital media, television had a much more central role in New Zealanders' lives, and it made a distinct contribution to local and national cultural development. Respondents in the 1990 research valued broadcast media as a source of local news and information. They valued impartial reporting that appealed to their intellect and were sceptical of the development of magazine-style current affairs programmes that editorialised the news. They also appreciated entertainment and documentary content made in and about New Zealand, as long as it was made to a high standard. Young people were especially interested in local programming, feeling that overseas programmes did not reflect New Zealand life.

(Excerpt from literature review)

“ We are a small country that punches well above its weight when it comes to sports. Our sports people are great ambassadors and their achievements reflect positively on us all ”

Māori New Zealander, 47 years, Male, AKL

Representative sports teams are most frequently identified as currently shaping and reflecting our identity

Table 10 shows that almost three-quarters of respondents (73%) stated that New Zealand's representative sports teams **currently** shape and reflect our identity as New Zealanders. This is not a surprising result given that 85% stated that one of the key characteristics about New Zealanders is that they are a 'sports minded people'.

Most other aspects were mentioned to a significantly lesser degree, including New Zealand performing arts (57%), New Zealand film/movies (55%) and cultural rituals (53%).

In comparison, 39% of respondents felt that New Zealand-made television programmes currently shape and reflect our identity as New Zealanders, while 26% felt this was the case for New Zealand radio.

This question was not asked in 1990.

Differences by age

Table 10 also shows that there are significant differences by age:

- For example, 81% of respondents aged 50-69 and 86% of those aged 70 years of age and over identified our representative sports teams as currently shaping and reflecting our national identity, whereas this was the case for 64% of both respondents aged 16-17 and those aged 18-24.
- Very young respondents, aged 16-17, were the age group least likely to have a view about what currently shapes and reflects New Zealand's identity, although it would appear that by the time respondents had become 18-24, they have begun to develop a point of view in this regard.

Table 10: Opinions about what currently shapes and reflects New Zealand's national identity, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
NZ representative sports teams	73	64	64	61	72	81	86
NZ performing arts (e.g. plays, kapa haka, dance)	57	58	61	57	57	55	59
NZ films/movies	55	49	50	46	54	60	62
Cultural rituals	53	56	59	55	55	51	43
NZ art	42	42	45	38	40	45	48
Traditional music and songs	42	33	47	39	39	44	47
NZ TV programmes	39	29	36	33	41	42	44
NZ modern music and songs	38	33	38	35	39	41	35
The oral telling of stories and poems	27	16	33	28	25	27	26
NZ literature (fiction and nonfiction)	34	22	29	26	31	37	46
NZ radio	26	15	25	22	25	26	35
None of the above	9	16	9	10	9	8	8

The base numbers shown are unweighted counts.
Totals may exceed 100% due to multiple response.

Our representative sports teams are regarded as the ‘most important’ in shaping and reflecting our identity

Having established what currently shapes and reflects our identity as New Zealanders, respondents were asked a further question to identify what they regarded was the **most important**.

Table 11 shows that, most frequently, New Zealand representative sports teams were identified (49%), as the most important in shaping and reflecting our identity.

Of note is the fact that, ‘cultural rituals’ (37%) and ‘New Zealand performing arts’ (32%) were

the aspects most frequently mentioned next, whereas New Zealand-made TV programmes were mentioned by 10% of respondents and New Zealand radio by four percent.

This question was also not asked in 1990.

Differences by age

Table 11 also shows that there are significant differences by age:

- While representative sports teams were again most frequently identified by most age groups as the most important in shaping and reflecting our identity as New Zealanders, respondents aged 18-24 were more likely to identify our performing arts, cultural rituals, and traditional music and song compared with other groups.

Table 11: Opinions about the most important aspects that shape and reflect New Zealanders’ identity by age, in comparison to aspects currently shaping and reflecting New Zealanders’ identity

	Currently shaping and reflecting	Most important to shape and reflect	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	Total	Total	55	203	296	440	480	186
	%	%	%	%	%	%	%	%
NZ representative sports teams	73	49	45	33	34	45	61	68
NZ performing arts (e.g. plays, kapa haka, dance)	57	32	35	40	37	31	29	24
NZ films/movies	55	23	16	20	21	22	28	22
Cultural rituals	53	37	36	43	37	39	34	30
NZ art	42	10	7	11	15	10	8	11
Traditional music and songs	42	14	13	20	13	11	15	15
NZ TV programmes	39	10	4	7	7	11	11	14
NZ modern music and songs	38	9	13	8	9	11	9	6
The oral telling of stories and poems	34	7	5	9	10	5	6	8
NZ literature (fiction and nonfiction)	27	8	2	6	8	8	9	12
NZ radio	26	4	2	4	4	3	4	6
None of the above	9	9	16	9	10	9	8	8

The base numbers shown are unweighted counts. Totals may exceed 100% due to multiple response.

- Note that our representative sports teams were more likely to be mentioned as the most important in shaping and reflecting our identity by respondents aged 50-69 and those aged 70 years and over.
- There was relatively little differentiation across the age groups in terms of the extent to which New Zealand-made television and radio were important contributors to shaping and reflecting New Zealanders' identity.

Listening to New Zealand radio stations and other services

Respondents were asked to identify what they listened to from a list of radio stations and other services. Table 12 shows the radio stations and other services that were **mentioned by 10% or more** of respondents, including the results for Community Access Radio and the Concert programme. Many others were mentioned, but often by one or two percent of respondents.

Note that 10% of respondents stated they did not listen to anything.

Table 12: Radio stations and other services listened to, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
Spotify	29	62	53	37	29	18	9
YouTube music	26	45	30	34	29	19	13
The Breeze	18	15	10	14	20	22	13
The Edge	18	29	31	28	19	11	2
More FM	15	9	14	14	19	16	11
The Rock	13	13	17	19	18	9	2
Coast	12	7	5	8	4	19	25
The Hits	12	15	16	13	16	10	2
Newstalk ZB	12	0	2	6	13	17	23
RNZ National/National Radio	10	0	2	5	8	11	29
ZM	10	11	19	19	12	4	0
YouTube Podcasts	8	13	16	13	6	5	3
Apple Podcasts	5	5	8	7	6	2	3
Concert FM/Radio New Zealand Concert	5	4	5	4	3	5	14
Radio New Zealand Podcasts	3	2	2	5	5	2	4
Google Podcasts	2	2	2	4	3	1	2
Community Access Radio station	1	2	1	2	1	1	0
I don't listen to any of these	10	9	8	10	7	10	18

The base numbers shown are unweighted counts. Totals may exceed 100% due to multiple response.

Differences by age

Table 12 also shows that there are significant differences by age. For example, younger respondents were more likely than older respondents to state they listened to Spotify (e.g. 53% of respondents aged 18-24 and 37% of those aged 25-34 compared with 18% of respondents aged 50-69 and nine percent for those aged 70 years and over).

On the other hand, older respondents were more likely than younger respondents to state they listened to RNZ National (e.g. 11% of respondents aged 50-69 and 29% of those aged 70 years and over compared with two percent of respondents aged 18-24 and five percent of those aged 18-24).

Table 13 shows the results for a question which asked respondents to identify what they 'most listened to'. This table confirms the pattern of response by age group outlined in Table 12.

Reasons for listening to preferred radio station

Respondents were asked to explain why they listened to the radio station they mostly listened to. Notwithstanding that there may be differences by the specific radio station listened to, Table 14 presents their explanations based on the **first reason** they gave. This shows that, most frequently, respondents stated they listened because, 'it plays the music I like' (33%) or 'it's informative and/or entertaining' (10%).

Table 13: Radio station or other service most listened to, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1497*	50	186	269	407	430	155
	%	%	%	%	%	%	%
Spotify	16	48	40	23	14	6	2
YouTube music	9	18	10	13	8	6	5
The Breeze	7	0	2	0	9	11	6
The Edge	4	4	5	9	5	3	0
More FM	5	2	2	2	7	7	4
The Rock	4	0	2	3	9	4	0
Coast	5	2	2	3	1	10	12
The Hits	3	0	2	1	5	3	0
Newstalk ZB	7	0	1	2	5	10	19
RNZ National/National Radio	6	0	1	1	3	7	22
ZM	3	4	2	8	5	1	0
YouTube Podcasts	1	0	4	2	1	1	0
Apple Podcasts	1	2	2	2	2	0	0
Concert FM/Radio New Zealand Concert	2	0	1	3	1	2	5
Radio New Zealand Podcasts	0	0	0	0	0	0	0
Google Podcasts	0	0	1	0	1	0	0
Community Access Radio station	0	0	0	1	0	0	0

The base numbers shown are unweighted counts.

Totals may not sum to 100% due to rounding.

* Sub-sample of respondents represent those who listened to a radio station or other service, and provided a valid response.

Note the relatively small percentage mentioning they listen to the radio station they mostly listen to because, 'I like learning about New Zealand and New Zealanders' (three percent).

Differences by age

Table 14 also shows that there are no significant differences by age.

Reasons for listening to preferred service

Respondents were also asked to explain why they listened to the service (e.g. Spotify, YouTube, etc.) they mostly listened to. Notwithstanding that there may be differences by the specific service listened to, Table 15 presents their explanations based on the **first reason** they gave. This shows that, most frequently, respondents stated they listened

Table 14: First reason for listening to radio station most listened to, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1008*	11**	66	147	282	361	141
	%	%	%	%	%	%	%
It plays the music I like	33	18	26	32	36	35	26
It's informative and/or entertaining	10	18	4	10	9	13	12
I like one/some of the presenters	8	0	8	8	8	9	7
I can relate to a lot of what they talk about	8	9	5	4	7	8	12
I can relate to the presenters' humour	7	0	6	13	9	6	5
It's well produced	5	0	7	3	6	4	7
It's great company	5	18	9	5	4	5	7
It plays some NZ music	5	9	4	9	4	4	4
It's a quick way to find out what's going on	5	9	9	3	3	4	8
It's ad-free	3	9	0	1	1	3	8
I like learning about New Zealand and New Zealanders	3	9	6	5	5	2	2
I like hearing people speaking te reo	1	0	3	1	2	0	1
It's what they play at the place I was at (e.g. work)	2	0	5	1	3	3	0
None of the above	5	0	7	5	4	6	1
Total	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.

Totals may not sum to 100% due to rounding.

* Sub-sample of respondents represent those who listened to a radio station and provided a valid response.

**Caution: low base number of respondents - results are indicative only.

because of the flexibility of the service. For example, 24% stated they listened because, 'I can easily find the music I like' and 22% stated they listened because, 'I can listen to what I like when I want'.

respondents were more likely than younger respondents to state they listened to the service because it was free (e.g. 21% for both respondents aged 35-49 and 50-69 compared with 10% for both respondents aged 18-24).

Differences by age

Table 15 also shows that there are some differences by age. For example, older

Table 15: Reasons for listening to service most listened to, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	426*	37	105	105	102	63	14**
	%	%	%	%	%	%	%
I can easily find the music I like	24	24	20	23	21	35	34
I can listen to what I like when I want	22	32	18	24	18	17	42
It's free	14	5	10	10	21	21	14
I can create my own playlists	12	14	13	14	10	11	0
It's ad-free	10	11	13	6	15	3	5
I can download it for off-line listening	10	8	13	11	8	8	0
I like to discover new music/artists	7	3	11	8	5	3	5
I can share play lists	0	0	1	0	0	2	0
None of the above	2	3	1	3	2	0	0
Total	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.

Totals may not sum to 100% due to rounding.


* Sub-sample of respondents represent those who listened to a service and provided a valid response.

**Caution: low base number of respondents - results are indicative only.



Key results 6 and 7

One-in-every four New Zealanders watch New Zealand (television and online) content because it shapes, reflects and informs their view of our national identity, while others do so because of its entertainment and information value



People interviewed in 1990 were subject to programming decisions made by broadcast networks and television channels, who selected content that targeted a broad cross-section of the population. Viewers grumbled about the over-scheduling of American sit-coms; a lack of news coverage; too much or too little sport; repeats, and advertising. However, they had few alternative media sources to turn to for news and entertainment. As broadcasting has shifted to a more individualised and interactive model, broadcasters are facing intense competition and being forced to innovate ... Consumers now have many alternatives and spread their time across a range of devices, viewing content or listening to music from a variety of sources and gaming online.

(Excerpt from literature review)

Drama, comedies, and documentaries are the 'programmes of choice'

Respondents were asked to identify their preferred television/online programmes. Table 16 shows that, based on respondents' **first preference**, the 'programme types of choice' were drama (23%), comedy (22%), and documentaries (19%). Another 14% identified current affairs/investigative journalism as their most preferred programme type.

All other programme types were mentioned by less than 10%.

Overall, 60% of respondents identified documentaries as one of their three most preferred programme types, while 53% identified both comedies and drama in their top three.

Respondents who identified drama programmes as their most preferred programme type were asked to identify the type of drama programme they preferred. Nineteen percent responded by saying they preferred any type of drama programme, whereas 26% specifically identified crime and murder mystery, 11% sci-fi, and 11% thrillers.

Similarly, respondents who identified documentaries as their most preferred programme type were asked to identify the type of documentary programme they preferred. Forty-five percent responded by saying they preferred any type of documentary, whereas 25% specifically identified documentaries of a historical nature.

Differences by age

Table 16 also shows that there are significant differences by age in terms of the programme types that are preferred.

Older respondents, for example, most preferred current affairs/investigative journalism, drama and documentaries, whereas younger respondents most preferred comedies. Younger respondents were also more likely to identify animations as their most preferred programmes.

Free-to-view TV is watched by most, but online videos, streaming and on-demand are also popular services

Respondents were asked to identify the services they used to watch the programmes they liked. Almost three-quarters of respondents (73%) stated they watched Free-to-view TV, but over one-half stated they watched online videos (e.g. via Facebook, YouTube) (57%) or paid for a streaming service such as Lightbox or Netflix (51%) (Table 17). Forty-five percent also stated they watched on demand services from a Free-to-view television channel, while 31% stated they watched Sky TV. The average respondent used about three different services.

Differences by age

There are significant differences by age. For example, whereas both 83% of respondents aged 50-69 and those aged 70 years and over watched Free-to-view TV, this was the case for 67% of respondents aged 16-17 and 54% of those aged 18-24 (Table 17). Older respondents were also more likely than younger respondents to watch Sky TV.

On the other hand, younger respondents were more likely to be watching online videos (82% of respondents aged 16-17 stated they did this and 70% of those aged 18-24 compared with 48% of respondents aged 50-69 and 29% of those aged 70 years and over). A similar pattern is evident in terms of paid streaming services.

Watching overseas-made content

Respondents were asked to reflect on the most recent television or online programme they had watched and asked whether that was New Zealand-made or overseas-made. Twenty-nine percent of the total sample stated the most recent programme they watched was New Zealand-made, 61% overseas-made, and 10% didn't know.

Respondents who most recently watched an

overseas-made programme were then asked a series of questions about this, including what service they had used to watch it, what device they had watched it on, and what factors influenced their decision to watch this

programme.

Services used

Table 18 shows that, most frequently, respondents who had watched an overseas-

Table 16: First preference programme type, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
Drama	23	20	14	17	21	30	26
Comedy	22	40	32	33	25	12	10
Documentaries	19	4	16	18	18	25	20
Current affairs/ Investigative journalism	14	2	9	8	11	17	31
Reality/lifestyle shows	8	7	8	11	10	7	5
Animation	4	16	10	5	3	1	0
Children's programmes	2	2	7	2	3	0	0
No preference	5	5	2	4	6	6	6
Don't know	2	4	2	2	2	2	3
Total	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.
Total may not sum to 100% due to rounding.

Table 17: Services used, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
Free to view TV (e.g. TVNZ 1, TVNZ 2, Three, Prime)	73	67	54	63	72	83	83
Online video (e.g. Facebook, YouTube, Vimeo)	57	82	70	73	62	48	29
A paid streaming service (e.g. Lightbox, Netflix)	51	62	64	66	57	40	25
On demand, from a free to view TV channel	45	36	36	49	50	46	39
Live on a Sky TV channel	31	22	27	25	25	37	44
Sky on demand (Sky Go)	10	5	11	15	9	9	6
Torrent site(s) (e.g. The Pirate Bay (TPB), EZTV)	8	7	13	12	8	6	1
None of the above	3	4	5	2	4	2	1

The base numbers shown are unweighted counts.
Totals may exceed 100% due to multiple response.

made programme on their most recent viewing occasion stated they had done so using a streaming service (36%), whereas 28% had watched it on Free-to-view TV and 17% had watched an online video.

Differences by age

Table 18 also shows that there are a number of significant differences by age. For example, older respondents were more likely than younger respondents to state they used Free-to-view TV (e.g. 46% of respondents aged 70 years and over compared with nine percent of those aged 18-24 and 16% of those aged 25-34), as well as Sky TV (e.g. 31% of respondents aged 70 years and over compared with seven percent of those aged 18-24 and eight percent of those aged 25-34).

In comparison, younger respondents were more likely than older respondents to state they watched on paid streaming services (e.g. 45% of respondents aged 16-17, 62% of those aged 18-24, and 50% of those aged 25-34 compared with 21% of respondents aged 50-69 and 16%

of those aged 70 years and over).

Devices used

Table 19 shows that respondents who had watched an overseas-made programme on their most recent viewing occasion stated they had done so on a smart TV (40%). About half as many respondents (21%) stated they had done so on a TV screen using another device (e.g. Chromecast) or a PC/ laptop/notebook (17%). Eight percent stated they had watched it on a smartphone.

Differences by age

Table 19 also shows a number of significant differences by age. For example, older respondents were more likely than younger respondents to state they had used a smart TV to watch the overseas-made programme they watched on their most recent viewing occasion (e.g. 47% of respondents aged 50-69 and 51% of those aged 70 years and over compared with 21% of respondents aged 16-17 and 11% of those aged 18-24).

Table 18: Services used to watch overseas content, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	939*	136	177	256	279	91	136
	%	%	%	%	%	%	%
A paid streaming service (e.g. Lightbox, Netflix)	36	45	62	50	42	21	16
Free to view TV (e.g. TVNZ 1, TVNZ 2, Three, Prime)	28	21	9	16	25	37	46
Online video (e.g. Facebook, YouTube, Vimeo)	17	28	27	21	20	13	5
Live on a Sky TV channel	14	7	7	8	7	21	31
On demand, from a free to view TV channel	12	14	9	10	12	13	15
Torrent site(s) (e.g. The Pirate Bay (TPB), EZTV)	3	0	7	4	4	2	1
Sky on demand (Sky Go)	1	0	1	1	1	1	2
Don't know	2	3	0	1	3	3	2

The base numbers shown are unweighted counts.

Totals may exceed 100% due to multiple response.

* Sub-sample of respondents represent those who watched overseas-made content on the last viewing occasion.

In contrast, younger respondents were more likely than older respondents to state they had used a PC/laptop/notepad (e.g. 35% of those aged 18-24 compared with 13% of respondents aged 50-69 and eight percent of those aged 70 years and over).

This was also the case with smartphones.

Reasons for watching

Given the devices used, most respondents who watched an overseas-made programme on their most recent viewing occasion stated they had done so by themselves (56%) as opposed to with someone else (45%).

When respondents were asked why they had watched overseas-made content on their most recent viewing occasion, other than the fact that 10% 'found it by chance', or nine percent 'felt like watching something', or three percent stated the 'person/people they were watching it with was watching it', a wide range of reasons was given (Table 20).

Based on the **first mentioned** reason, many stated they had watched it because it was something that they 'had enjoyed watching before' (15%), or 'it was like something similar that they had enjoyed watching before' (12%), or it was 'informative and entertaining' (nine percent).

Others stated the reason why they had watched it was because 'it was recommended' (five percent), or they 'saw it advertised' (five percent), or 'lots of people were talking about it' (three percent).

Some specifically stated they watched it because it was 'well made' (eight percent), or they 'liked the actors/presenters' (five percent).

Others stated they had watched it because 'they didn't have to pay' (five percent), or it was 'ad free' (three percent).

On the other hand, relatively few stated they watched the overseas-made content they had watched on their most recent viewing occasion because 'it was in their language' (two percent) or 'it was culturally relevant' (one percent).

Table 19: Devices used to watch overseas programmes, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	939*	29**	107	177	256	279	91
	%	%	%	%	%	%	%
Smart TV	40	21	11	44	40	47	51
A TV screen using another device (e.g. Playstation, Apple TV, Chromecast)	21	14	29	21	24	17	13
PC/laptop/notebook	18	21	35	15	20	13	8
Smartphone	8	28	19	13	7	2	0
Tablet	4	10	4	5	5	3	2
Other	9	3	2	1	4	16	24
Don't know	1	3	0	0	0	1	2
Total	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

*Sub-sample of respondents represent those who watched overseas-made content on the last viewing occasion.

**Caution: low base number of respondents - results are indicative only.

Differences by age

Table 19 shows that there are relatively few differences by age.

Watching New Zealand-made content

Respondents who stated they had watched a **New Zealand-made TV/online programme** on their most recent viewing occasion (29%), and respondents who had watched an overseas-made programme, but also confirmed they had watched a **New Zealand-made programme 'recently'**¹⁴, were asked a series of questions about the last New Zealand-made programme

they had watched. Fifty two percent of the total sample were asked these questions; meaning that 48% had not watched a New Zealand-made TV/online programme recently.

Questions included what service they had used to watch it, and what factors influenced their decision to watch this programme.

Services used

Table 21 shows the services used to watch the New Zealand-made programme most recently viewed, with Free-to-view TV being most frequently mentioned (61%), followed by on demand (16%).

In comparison, online videos (seven percent)

Table 20: First mentioned reason for watching overseas-made programmes, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	939*	29**	107	177	256	279	91
	%	%	%	%	%	%	%
It's something that I have watched before and enjoyed	15	10	15	16	14	15	15
It was like something I enjoyed watching before	12	17	12	11	10	14	15
It was informative and/or entertaining	9	3	6	7	10	12	11
It was recommended	5	10	9	7	6	1	1
I saw it advertised	5	3	1	4	5	6	8
Lots of people are talking about it	3	3	4	4	3	2	2
It was well made	8	7	6	5	9	9	12
I like one/some of the actors/presenters	5	7	6	4	5	5	4
I didn't have to pay to watch it	5	3	4	4	6	4	6
It was ad-free	3	0	7	3	2	4	2
It was culturally relevant	1	0	2	1	0	1	4
It was made for my age group	2	3	4	3	0	1	2
It was in my language	2	0	4	2	3	1	5
I found it by chance and liked the look of it	10	10	6	13	11	10	10
I just felt like watching something	9	17	10	9	12	8	2
The person/people I was with were watching it	3	0	5	3	3	4	2
The person/people I was with were watching it	3	0	5	3	3	4	2
None of the above	2	3	3	3	1	2	1
Total	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

*Sub-sample of respondents represent those who watched overseas-made content on the last viewing occasion.

**Caution: low base number of respondents - results are indicative only.

and streaming services (five percent) were significantly less frequently mentioned. This pattern of response is significantly different from that for overseas-made programmes (see previous section).

Differences by age

Free-to-view TV was the service most frequently used by all age groups to watch the New Zealand-made programme they had watched on their most recent viewing occasion/recently.

However, Table 21 shows that older respondents were considerably more likely than younger respondents to have watched their

most recent New Zealand-made programme on Free-to-view TV. For example, 72% of respondents aged 50-69 and 80% of those aged 70 years and over watched their programme on Free-to-view TV compared with 45% of respondents aged 18-24 and 43% of those aged 25-34.

In comparison, younger respondents were more likely than older respondents to have watched their most recent New Zealand-made programme as an online video and/or through a streaming service. For example, this applied to 13% of respondents aged 18-24 and 12% of those aged 25-34 compared with four percent of respondents aged 50-69 and one percent of those aged 70 years and over.

Table 21: Services used to watch New Zealand-made programmes, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	856*	22**	98	155	227	256	98
	%	%	%	%	%	%	%
Live on Free to view TV (e.g. TVNZ 1, TVNZ 2, Three, Prime)	61	59	45	43	57	72	80
On demand, from a free to view TV channel	16	14	18	26	22	11	7
Live on a Sky TV channel	7	0	7	5	5	8	12
Online video (e.g. Facebook, YouTube, Vimeo)	7	18	13	12	8	4	1
On a paid streaming service (e.g. Lightbox, Netflix)	5	5	10	9	5	3	0
On demand on Sky Go	1	0	3	3	1	1	0
On a Torrent site (e.g. The Pirate Bay (TPB), EZTV)	0	0	1	0	1	0	0
Don't know	1	5	2	3	1	1	0
Total	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

*Sub-sample of respondents represent those who watched New Zealand-made content on the last viewing occasion/recently.

**Caution: low base number of respondents - results are indicative only.

Reasons for watching

Many respondents stated that they had watched the New Zealand-made programme they had recently watched because they had watched it before, or something similar, and it was enjoyable and/or informative.

However, Table 22 shows that many respondents stated they had watched the New Zealand-made programme they had watched most recently because of its unique New Zealand features. Overall, this applied to one-in-every four respondents based on the total sample.

Differences by age

All age groups also stated, to more or less the same extent, that the reason they had watched the New Zealand-made programme they had recently watched was because it was enjoyable and/or informative.

All age groups also stated, to more or less the same extent, that the reason they had watched the programme was because, 'it captured who we are as New Zealanders, including our humour' and because, 'there is something special about seeing familiar New Zealand places and faces and hearing New Zealand accents'.

Older respondents in particular (i.e. those aged 70 years and over) were more likely than the younger age groups to state they had watched the programme because, 'I like learning about

New Zealand and New Zealanders' (e.g. 38% compared with 21% for both respondents aged 25-34 and 35-49, and 19% for those aged 50-69).

Although the percentages are relatively small, younger respondents were more likely than the older age groups to state they had watched the New Zealand-made programme because, 'I like hearing people speaking te reo' (e.g. eight percent for respondents aged 18-24 compared with two percent for respondents aged 50-69 and one percent for those aged 70 years and over).

“ With Netflix and You Tube you can just pick what you want to watch, and you don't have to deal with the ads. Whereas with TV, its like, ok sit down and watch this and then there are five minutes worth of ads ”

Fijian New Zealander, 22 years, Female, CHC

“ It [NZ content] validates what you feel yourself a lot of the time. You see something and go, Yeah, I can relate to that ”

European New Zealander, 64 years. Male CHC

Table 22 First mentioned reason for watching New Zealand-made programmes, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	853*	22**	97	155	226	255	98
	%	%	%	%	%	%	%
It was something I've watched before and enjoyed	23	14	17	24	23	28	19
It was informative and/or entertaining	23	5	22	21	20	31	23
It was like something I enjoyed watching before	16	23	15	9	17	17	19
It was well made	14	14	7	9	13	15	26
I saw it advertised	12	5	6	11	11	17	8
I like one/some of the actors/presenters	9	9	8	11	10	7	11
Lots of people were talking about it	5	0	14	5	7	2	0
It was recommended	4	0	8	4	7	3	0
I didn't have to pay to watch it	11	9	5	8	11	12	16
It was ad-free	3	0	6	5	1	2	7
It captured who we are as New Zealanders, including our humour	22	27	22	13	22	26	24
I like learning about New Zealand and New Zealanders	22	14	15	21	21	19	38
There is something special about seeing familiar New Zealand places and faces and hearing New Zealand accents	21	18	17	20	17	20	35
I like hearing people speaking te reo	3	5	8	4	2	2	1
I could really connect with it	9	5	10	6	7	13	6
It was about people like me	6	5	7	7	5	5	6
It was made for my age group	4	0	5	6	5	3	2
I just felt like watching something	11	14	10	14	15	6	11
The person/people I was with were watching it	7	23	13	8	8	5	1
None of the above	2	5	3	2	2	2	1

The base numbers shown are unweighted counts.

Totals may exceed 100% due to multiple response.

* Sub-sample of respondents represent those who watched New Zealand-made content on the last viewing occasion/recently.

**Caution: low base number of respondents - results are indicative only.



Key result 8 | Regardless of whether they watch New Zealand-made content, in principle, it's considered important

Technological change and convergence have shifted how audiences discover and engage with media content¹⁴. This complicates the delivery of public service outcomes¹⁵. New Zealand's Broadcasting Act aims to ensure the availability of broadcasts that provide for the interests of ethnic minorities, people with disabilities, children, women, and youth. Publicly

supported services to non-mainstream audiences demonstrate the state's obligation to its citizens and symbolise the state's recognition of New Zealand's social and cultural diversity.

(Excerpt from literature review)

Opinions about New Zealand-made TV/online programmes

Respondents were asked to identify what would encourage them to watch more New Zealand-made TV/online programmes, excluding the news, sport, homemade videos, and ads.

To provide context, respondents who had **only watched overseas-made content** were first asked to agree or disagree with a number of statements describing New Zealand-made TV/online programmes. Table 23 outlines these respondents' opinions with the key results being as follows:

- Many respondents considered overseas-made programmes to be more appealing to them (57%) and, therefore, of more interest (57%), also describing them as being of better quality (63%).
- More specifically, many stated there were no/not enough New Zealand-made programmes for their age group (24%), their culture (24%), or their language (10%).
- Only 33% explicitly agreed that, 'NZ programmes reflect a New Zealand I can identify with', although 43% stated, that they were 'not sure what NZ programmes/shows are available'.
- However, most agreed that, there 'are too many commercial breaks which spoil programmes' (72%).

However, against this background and despite them not watching New Zealand-made content, a little over one-half (54%) agreed

that, 'in principle, I think having access to TV shows about NZ and New Zealanders is very important'. Furthermore, 50% agreed that, 'there is something special about seeing familiar places in New Zealand and hearing New Zealand voices'.

Differences by age

Table 23 also shows that there are significant differences by age for those respondents who only watch overseas content.

For example, younger respondents were more likely than older respondents to state that, 'there aren't many programmes for my age group' (e.g. 38% of respondents aged 16-17 and 34% of those aged 18-24 compared with 23% for respondents aged 35-49 and 17% for those aged 50-69). At 27%, respondents aged 70 years and over were also above average in this regard.

However, of interest is the fact that younger respondents were also more likely to state that, 'to be honest, I'm not sure what New Zealand programmes/shows are available' (e.g. 58% of respondents aged 16-17 and 48% of those aged 18-24 compared with 38% for respondents aged 25-34 and 37% for those aged 50-69).

Younger respondents were also more likely than older respondents to state that, 'the quality of overseas programmes is better' than older respondents (e.g. 67% of respondents aged 18-24 and 77% of those age 25-34 compared with 59% of respondents aged 50-69 and 50% of those aged 70 years and over). This was also reflected in their agreement with the statement, 'I'm more interested in watching overseas programmes' (e.g. 71% of respondents aged 18-24 and 67% of those age 25-34 compared with 58% of respondents aged 50-69 and 49% of

“ Without [NZ made content] we would lose our sense of identity and understanding of who we are ”

Fijian New Zealander, 22 years, Female, CHC

those aged 70 years and over), as it was in their level of agreement with the statement, 'New Zealand produced TV dramas are not as good as overseas dramas' (56% of respondents aged 18-24 compared with 44% of respondents aged 70 years and over).

Older respondents were more critical of the number of commercial breaks than younger respondents (e.g. 80% of respondents aged 50-69 and 88% of those aged 70 years and over compared with 61% for both respondents aged 18-24 and those aged 25-34).

However, older respondents were also more likely to state that, 'there is something special about seeing familiar places in New Zealand and hearing New Zealand voices' (e.g. 51% of respondents aged 50-69 and 56% of those aged 70 years and over compared with 44% for respondents aged 16-17 and 45% for those

aged 25-34). All age groups agreed to more or less the same extent that, 'in principle, I think having access to TV shows about New Zealand and New Zealanders is very important'.

“ If there was no NZ media content then I think it would be very hard to maintain our cultural identity. For example, if we only had Australian content, we would pretty soon become Australian ”

Malaysian New Zealander, 37 years, Male, Wairarapa

Table 23: Agreement-disagreement with statements about New Zealand-made TV/online programmes, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	724*	29**	84	125	195	210	81
	%	%	%	%	%	%	%
There are too many commercial breaks which spoil programmes							
Agree	72	59	61	61	70	80	88
Neither agree nor disagree	18	14	25	24	21	14	11
Disagree	6	10	8	10	7	4	2
Don't know	3	17	6	4	2	2	0
Total	100	100	100	100	100	100	100
The quality of overseas programmes is better							
Agree	63	52	67	77	64	59	50
Neither agree nor disagree	27	21	18	19	26	31	38
Disagree	7	6	9	4	7	8	9
Don't know	4	21	7	0	4	2	3
Total	100	100	100	100	100	100	100

Table 23: Agreement-disagreement with statements about New Zealand-made TV/online programmes, by age (continued)

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	724*	29**	84	125	195	210	81
	%	%	%	%	%	%	%
There aren't many programmes that appeal to me							
Agree	57	48	53	59	64	52	62
Neither agree nor disagree	25	34	24	20	23	31	23
Disagree	14	7	15	17	11	15	16
Don't know	3	10	9	3	2	2	0
Total	100	100	100	100	100	100	100
I'm more interested in watching overseas programmes							
Agree	57	52	71	67	60	48	48
Neither agree nor disagree	31	31	18	22	30	40	36
Disagree	10	3	5	10	9	10	14
Don't know	3	14	6	1	2	2	1
Total	100	100	100	100	100	100	100
In principle, I think having access to TV shows about NZ and New Zealanders is very important							
Agree	54	38	50	51	59	56	52
Neither agree nor disagree	32	45	32	28	29	33	37
Disagree	11	7	11	16	9	9	9
Don't know	4	10	7	6	3	2	2
Total	100	100	100	100	100	100	100
NZ produced TV dramas are not as good as overseas dramas							
Agree	51	55	56	64	54	42	44
Neither agree nor disagree	27	14	18	20	29	32	32
Disagree	16	14	16	12	12	23	17
Don't know	6	17	11	4	5	2	8
Total	100	100	100	100	100	100	100
There is something special about seeing familiar places in New Zealand and hearing New Zealand voices							
Agree	50	44	45	54	47	51	56
Neither agree nor disagree	32	31	33	29	32	32	29
Disagree	15	14	12	14	16	14	14
Don't know	4	10	9	3	4	2	2
Total	100	100	100	100	100	100	100

Table 23: Agreement-disagreement with statements about New Zealand-made TV/online programmes, by age (continued)

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	724*	29**	84	125	195	210	81
	%	%	%	%	%	%	%

To be honest, I'm not sure what NZ programmes/shows are available

Agree	43	58	48	38	45	37	46
Neither agree nor disagree	33	17	30	29	33	35	43
Disagree	21	10	14	31	19	25	9
Don't know	3	14	7	1	3	2	2
Total	100	100	100	100	100	100	100

NZ programmes reflect a New Zealand I can identify with

Agree	33	20	30	38	30	30	43
Neither agree nor disagree	41	34	45	37	38	45	40
Disagree	20	17	13	16	27	20	14
Don't know	7	28	11	8	5	5	3
Total	100	100	100	100	100	100	100

There aren't any/many programmes about my culture

Agree	24	24	29	33	28	18	15
Neither agree nor disagree	38	31	39	29	37	39	46
Disagree	28	17	18	30	29	34	26
Don't know	10	28	15	8	6	9	12
Total	100	100	100	100	100	100	100

There aren't many programmes for my age group

Agree	24	38	34	26	23	17	27
Neither agree nor disagree	40	34	36	35	41	42	43
Disagree	28	14	20	32	30	33	25
Don't know	7	14	9	6	6	8	4
Total	100	100	100	100	100	100	100

There aren't any programmes in my language

Agree	10	0	12	21	16	5	3
Neither agree nor disagree	18	21	23	19	18	16	13
Disagree	67	65	55	59	63	74	81
Don't know	5	14	10	2	3	5	3
Total	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.

Totals may not sum to 100% due to rounding.

* Sub-sample of respondents represent those who watched overseas-made content on the last viewing occasion.

**Caution: low base number of respondents - results are indicative only.

A person is bungee jumping, suspended in mid-air against a solid purple background. The person is wearing a white t-shirt, white shorts, and a green harness. Their legs are extended upwards, and their arms are outstretched. The bungee cord is visible at the top left, with green and blue components. The text 'Key result 9' is positioned to the left of the main title, which is 'With changes, more New Zealanders would watch New Zealand-made content'.

Key result 9 | With changes, more New Zealanders would watch New Zealand-made content

“ My generation we don't really watch TV anymore, it's the older generation. If they had stuff curated for us that would be better. They need to evolve with the times and not try too hard because then it becomes cringe. It needs to be real ”

Samoan New Zealander, 20 years, female, CHC

Encouraging greater viewership of New Zealand-made content

All respondents (i.e. those that only watched overseas-made content, as well as those who watched New Zealand-made content) were asked what would encourage them to start watching or watch more New Zealand-made content (excluding the news, sport, homemade videos, and ads). They were presented with a list of possible factors that would encourage this.

Table 24 compares the results for these two groups of respondents and shows the following:

- First and foremost, most ‘overseas-made content watchers’ and most ‘New Zealand-made content watchers’ responded positively to the question, meaning that they were open to the idea of starting to watch or watching more New Zealand-made content. In this regard, 15% of ‘overseas-made content watchers’ categorically stated that nothing would encourage them to start watching New Zealand-made content compared with eight percent of ‘New Zealand-made content watchers’.
- Both groups agreed to the same extent that they would start/watch more New Zealand-made content if they could watch ad free. This was the factor that was most frequently mentioned (40% of ‘New Zealand-made content watchers’ and 42% of ‘overseas-made content watchers’).
- While making programmes that ‘they liked’ and improving quality were important issues for ‘New Zealand-made content watchers’, these factors were more frequently mentioned by ‘overseas-made content watchers’. For example, 39% of overseas-made content watchers’ stated they would start watching New Zealand-made content if ‘the quality improved’ compared with 23% of New Zealand-made content watchers’. As such, this reflects their opinions about New Zealand-made content (see previous section).
- Similarly, while access-related factors were frequently mentioned by ‘overseas-

made content watchers’, they were more frequently mentioned by ‘New Zealand-made content watchers’. For example, 27% of ‘New Zealand-made content watchers’ stated they would watch more New Zealand-made content if ‘available on the service(s) I watch’ compared with 17% of ‘overseas-made content users’. As noted earlier in this report, these services are mainly Free-to-view TV.

- ‘New Zealand-made content watchers’ also appear to be more interested in programmes that are about New Zealand and New Zealanders, including those about different cultures and about Māori. For example, 25% of ‘New Zealand-made content watchers’ stated they would watch more New Zealand-made content if it ‘presented profiles (stories) of New Zealand people and their way of life, so we could see how different people live’ compared with 19% of ‘overseas-made content watchers’.

Differences by age

New Zealand-made content watchers

In terms of the factors that would encourage ‘**New Zealand-made content watchers**’ to watch more New Zealand-made content, there are a number of interesting differences by age.

All age groups, most frequently stated they would watch more New Zealand-made content if they could watch ad free (Table 25). However, older respondents were more likely than younger respondents to state this (e.g. 45% of respondents aged 50-69 and 62% of those 70 years and over compared with 34% of respondents aged 18-24 and 31% of both those aged 25-34) and aged 35-49 years.

Older respondents were also more likely than younger to state that they would watch more New Zealand-made content if the programmes they liked were made (e.g. 36% of respondents aged 50-69 and 37% of those 70 years and over compared with 23% of respondents aged 18-24 and 27% of those aged 25-34). As noted earlier in this report, their ‘programme types of choice’ were identified as being dramas, documentaries, current affairs, and comedies.

Table 24: Factors that would encourage watching more New Zealand-made content

	New Zealand-made content watchers	Overseas-made content watchers
Unweighted base =	936*	724**
	%	%
If I could watch them ad free	40	42
If programmes were available on the service(s) I watch	27	17
If programmes were better advertised	25	17
If you were able to watch them on demand	24	20
If there was one website, channel or app to go for all New Zealand programmes	23	19
If you were able to download or stream them easily	12	10
If they made the types of programmes I like to watch	31	42
If the quality improved	23	39
If there were programmes/shows for my age group	10	11
If there were programmes/shows that included people like me	10	9
If they made good quality short (10-15 min) programmes	9	6
If there were programmes that presented profiles (stories) of New Zealand people and their way of life, so we could see how different people live	25	19
If there were more programmes reflecting the range of cultures in New Zealand, not just Māori and Pākehā	17	12
If there were more programmes for and about Māori in the places I like to watch	7	3
None of the above	8	15

The base numbers shown are unweighted counts.

Totals may exceed 100% due to multiple response.

* Sub-sample of respondents represent those who watched New Zealand-made content on the last viewing occasion/recently.

** Sub-sample of respondents represent those who watched overseas-made content on the last viewing occasion and did not watch any New Zealand-made content recently.

In this regard, older respondents were also more likely than younger respondents to state they would watch more New Zealand-made content if it presented profiles (stories) of New Zealand people and their way of life (e.g. 29% of respondents aged 50-69 and 50% of those 70 years and over compared with 14% of respondents aged 18-24 and 13% of those aged 25-34).

Younger respondents, on the other hand, were more likely than older respondents to state they would watch more New Zealand-made content if it was available on the services they watched

and it was for their age group. For example, 39% of respondents aged 18-24 stated they would watch more New Zealand-made content if it 'was available on the services I watch' compared with 18% of respondents aged 50-69.

Overseas-made content watchers

In terms of the factors that would encourage 'overseas-made content watchers' to start watching New Zealand-made content, every age group identified being able to watch New Zealand-made content ad free most frequently or very frequently (Table 26). Similarly, every

age group identified quality-related factors and being able to watch the programmes they liked frequently or very frequently.

Younger respondents were more likely than older respondents to state they would start watching New Zealand-made content if it was available on the service they watched, including

being able to download or stream programmes easily, as well as programmes being better advertised. For example, 21% of respondents aged 18-24 and 13% of those aged 25-34 stated they would start watching New Zealand-made content if they could download or easily stream programmes compared with six percent of respondents aged 50-69 and zero percent of

Table 25: Factors that would encourage watching more New Zealand-made content – by New Zealand-made content watchers, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	936*	26**	119	171	245	255	98
	%	%	%	%	%	%	%
If I could watch them ad free	40	35	34	31	31	45	62
If programmes were available on the service(s) I watch	27	27	39	27	31	18	25
If programmes were better advertised	25	31	25	26	25	20	32
If you were able to watch them on demand	24	19	17	25	32	23	20
If there was one website, channel or app to go for all New Zealand programmes	23	27	25	24	24	20	23
If you were able to download or stream them easily	12	15	18	13	11	10	11
If they made the types of programmes I like to watch	31	15	23	27	30	36	37
If the quality improved	23	23	21	22	25	23	19
If there were programmes/shows for my age group	10	19	10	12	8	7	16
If there were programmes/shows that included people like me	10	8	10	14	8	10	8
If they made good quality short (10-15 min) programmes	9	12	7	10	8	8	16
If there were programmes that presented profiles (stories) of New Zealand people and their way of life, so we could see how different people live	25	19	14	13	23	29	50
If there were more programmes reflecting the range of cultures in New Zealand, not just Māori and Pākehā	17	0	16	16	15	19	26
If there were more programmes for and about Māori in the places I like to watch	7	4	11	8	7	5	8
None of the above	8	0	4	6	10	10	6

The base numbers shown are unweighted counts. Totals may exceed 100% due to multiple response.

* Sub-sample of respondents represent those who watched New Zealand-made content on the last viewing occasion/recently.

**Caution: low base number of respondents - results are indicative only.

those aged 70 years and over.

On the other hand, older respondents were more likely than younger respondents to state they would start watching New Zealand-made content if it included programmes that presented profiles (stories) of New Zealand people and their way of life, so we could see how different

people live' (e.g. 22% of respondents aged 50-69 and 37% of those age 70 years and over stated this compared with 13% of respondents aged 18-24 and 11% of those aged 25-34). All age groups showed limited interest in cultural programmes.

Table 26: Factors that would encourage watching more New Zealand-made content – by overseas-made content watchers, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	724*	29**	84	125	195	210	81
	%	%	%	%	%	%	%
If I could watch them ad free	42	48	39	37	32	47	59
If programmes were available on the service(s) I watch	17	28	37	15	14	14	11
If programmes were better advertised	17	21	23	23	12	16	18
If you were able to watch them on demand	20	38	22	22	19	17	20
If there was one website, channel or app to go for all New Zealand programmes	19	21	14	19	14	20	27
If you were able to download or stream them easily	10	17	21	13	9	6	0
If they made the types of programmes I like to watch	42	45	36	32	39	49	50
If the quality improved	39	41	35	35	38	42	38
If there were programmes/shows for my age group	11	34	13	13	7	9	14
If there were programmes/shows that included people like me	9	17	12	11	9	8	4
If they made good quality short (10-15 min) programmes	6	7	5	8	6	5	6
If there were programmes that presented profiles (stories) of New Zealand people and their way of life, so we could see how different people live	19	17	13	11	13	22	37
If there were more programmes reflecting the range of cultures in New Zealand, not just Māori and Pākehā	12	14	8	10	12	14	15
If there were more programmes for and about Māori in the places I like to watch	3	0	6	7	2	2	0
None of the above	15	14	15	20	17	13	9

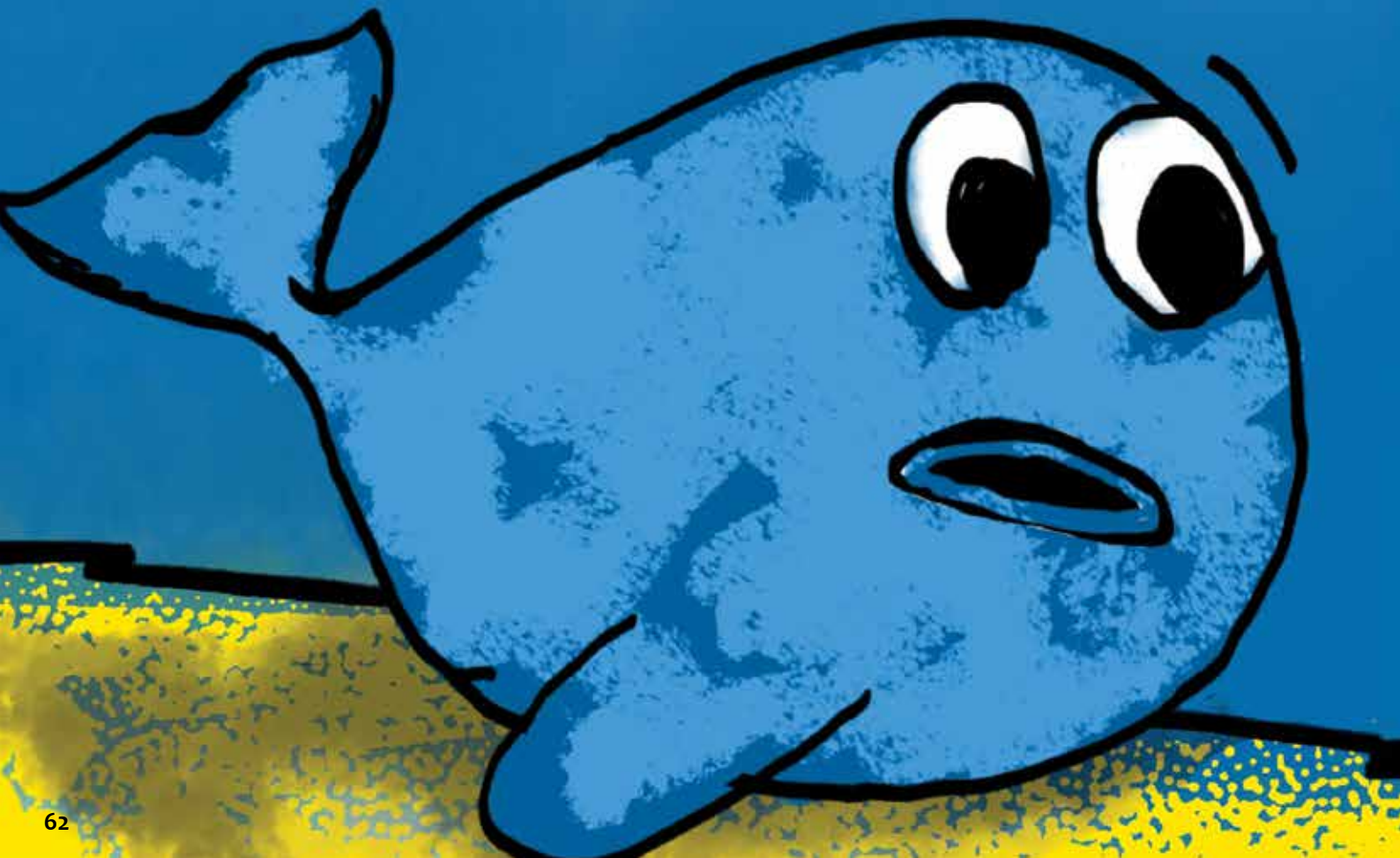
The base numbers shown are unweighted counts.


Totals may exceed 100% due to multiple response.

* Sub-sample of respondents represent those who watched overseas-made content on the last viewing occasion and did not watch any New Zealand-made content recently.

**Caution: low base number of respondents - results are indicative only.

Key result 10 | **New Zealanders
want news media
that is independent
and informative**





In this final section of the report, we present the results relating to the New Zealand news media.

“ I don't watch the news on TV now. It seems to be biased and often dominated by personal opinions. The other thing I find is that newspaper headlines are misleading. If you just read or listen to one story you may be getting it completely wrong, so I go online and look at things like Reuters. I don't believe any of the stories, but at least you get a general picture. It would be nice to get information without the spin on it. Real, unbiased news - the facts. ”

European New Zealander, 64 years, Male, CHC

‘Free, independent, trustworthy news is critical for democracy’

Respondents were asked their opinions about the New Zealand news media, defined as including newspapers, as well as online, radio and TV news sources.

Table 27 shows that respondents had high expectations of the media in terms of keeping them informed ‘about what is going on in the rest of the world’ (81%), as well as ‘local issues and community life’ (81%). At the same time, respondents expected a high level of integrity from the media, with over three-quarters agreeing that, ‘free, independent, trustworthy news is critical for democracy in New Zealand’ (78%).

Respondents were less certain about a number of other important issues, including:

- Whether they were more likely to, ‘come across fake news on social media than through the traditional New Zealand news media’ (while 61% agreed with this statement and 10% disagreed, 23% gave a neutral response, neither agreeing nor disagreeing).
- Over one-half of respondents (59%) also agreed that ‘sometimes they feel that news reporting is more about entertainment than sharing information’. Again, while 11% disagreed, many gave a neutral response (27%).
- Similarly, one-half of respondents (54%) agreed that ‘New Zealand news reporting sometimes feels like it’s more about opinions than facts’. Again, while 10% disagreed, many gave a neutral response (31%).

Overall one-in-every two respondents (49%) agreed that they, ‘trust New Zealand news media’s reporting, 16% disagreed, and 33% gave a neutral response. Furthermore, many were unsure whether they should trust the New Zealand news media more than overseas sources (39% agreed they could, but 17% disagreed, and 41% gave a neutral response). In fact, over one third (36%) categorically stated that, ‘news reporting in New Zealand is too biased’ (18% disagreed, and 39% gave a neutral response).

Differences by age

In general, older respondents were more likely than younger respondents to have high expectations of the New Zealand news media.

Table 27 shows that all age groups were more or less equally critical of the news media in terms of its accuracy, and more likely to be of the opinion that it was sometimes more about entertainment than information sharing, and opinion-based rather than factual. For example, while 66% of respondents aged 25-34 agreed that they, ‘sometimes feel that news reporting is more about entertainment than sharing information’, this compares with 53% for respondents aged 18-24 and 58% for those aged 50-69.

Overall, significant percentages of all age groups agreed that, ‘news reporting in New Zealand is too biased’, but this peaked amongst respondents aged 25-34 (46%). This compares with 33% for respondents aged 18-24 and 34% for those aged 50-69.

Table 27: Agreement-disagreement with statements about New Zealand news media, by age

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%

The media has an obligation to inform people about what is going on in the rest of the world

Agree	81	76	64	76	81	87	92
Neither agree nor disagree	13	16	25	13	14	11	6
Disagree	4	0	6	8	3	2	1
Don't know	2	7	6	3	2	0	1

I expect the media to keep New Zealanders in touch with local issues and community life

Agree	81	76	70	76	81	84	88
Neither agree nor disagree	14	15	22	16	13	13	10
Disagree	3	4	4	4	3	1	1
Don't know	2	5	3	4	2	1	1

Free, independent, trustworthy news is critical for democracy in New Zealand

Agree	78	67	63	71	80	82	87
Neither agree nor disagree	16	22	24	17	16	15	10
Disagree	2	2	3	5	2	1	1
Don't know	4	9	11	7	2	2	2

I'm more likely to come across fake news on social media than through the traditional New Zealand news media

Agree	61	63	54	66	58	62	61
Neither agree nor disagree	23	18	29	17	24	22	24
Disagree	10	7	9	11	12	9	8
Don't know	7	11	9	6	5	6	7

I sometimes feel that news reporting is more about entertainment than sharing information

Agree	59	51	53	66	60	58	56
Neither agree nor disagree	27	25	34	22	25	27	32
Disagree	11	15	6	7	12	13	9
Don't know	4	9	7	5	3	2	3

NZ news reporting sometimes feels like it's more about opinions than facts

Agree	54	50	47	61	55	54	54
Neither agree nor disagree	31	27	38	21	28	33	36
Disagree	10	11	6	11	12	10	9
Don't know	5	11	9	7	4	3	1

Table 27: Agreement-disagreement with statements about New Zealand news media, by age (continued)

	Total	16-17 years	18-24 years	25-34 years	35-49 years	50-69 years	70 years or over
Base =	1,660	55	203	296	440	480	186
	%	%	%	%	%	%	%
I trust New Zealand News media's reporting							
Agree	49	49	53	52	52	42	46
Neither agree nor disagree	33	35	31	29	28	37	39
Disagree	16	13	9	16	16	19	13
Don't know	3	4	6	4	3	1	2
I trust New Zealand news media more than overseas sources							
Agree	39	45	43	45	40	34	35
Neither agree nor disagree	41	35	34	35	39	46	47
Disagree	17	11	11	15	18	18	14
Don't know	4	9	11	4	3	2	4
News reporting in NZ is too biased							
Agree	36	43	33	46	37	34	29
Neither agree nor disagree	39	31	39	30	38	42	50
Disagree	18	16	14	16	20	20	18
Don't know	6	9	14	8	5	3	3

The base numbers shown are unweighted counts.
Totals may not sum to 100% due to rounding.

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Appendix | Survey development and methodology



Survey development

The survey questionnaire was developed in collaboration with our client at NZ On Air and designed to be completed online. The development of the questionnaire was informed by:

- A review of the 1990 survey questionnaire.
- The results of a preliminary qualitative stage of research which investigated how New Zealanders currently view their identity and culture.

This qualitative interviewing was completed on one-on-one, face-to-face (kanohi ki te kanohi) basis. The n=30 respondents who were interviewed in the one-hour long unstructured interviews were primarily recruited on the basis of their ethnicity and geographic location. Secondary recruitment criteria included age (with an emphasis on younger people 15–20 and older people aged 65+). Emphasis was also placed on respondents who might be disadvantaged, based on their economic status, and/or their physical/mental wellbeing.

When the questionnaire was in a draft form, it was cognitively tested with a small cross-section of the intended survey audience. The purpose of the testing was to confirm that the lines of questioning and their order in the questionnaire was easily understood by the average respondent. This testing resulted in only minor changes to the wording of some questions.

Pilot survey

When the survey was ready to go live, it was initially ‘soft’ launched in order to ensure that all related survey processes were functioning as intended.

The main survey

Following the completion of this piloting, the survey was fully launched on 28th August 2019. A copy of the final survey questionnaire may be found in the e-report for this research. The survey was completed as a ‘blind’ survey (i.e. NZ On Air was not identified as the sponsor of the survey).

Interviewing was completed with a nationally-representative sample of n=1,660 New Zealanders, 16 years of age and over, by the 30th August 2019. People who identified as Māori or Pacific were over-sampled, as were young people 16–17 years of age, in order to be able to analyse their results with reasonable confidence. Post-interviewing, the dataset

was weighted to adjust for this over-sampling.

The sample was sourced from Dynata, the largest panel provider in New Zealand, with about 300,000 ‘active’ members and the survey hosted on our secure online survey platform.

Post-interviewing processing

Potential respondents were sampled to be nationally-representative of the New Zealand population, 16 years of age and over, with the over-sampling as described above. In this regard, ‘soft’ quotas were set in terms of age, gender, ethnicity, and geographic location. These quotas were continuously monitored during the time the survey was in the field and adjusted accordingly.

Consequently, only minor weighting by age, gender, and ethnicity was required post-interviewing to ensure the final weighted sample was representative. The weighting specifications were based on the 2013 Census of Population & Dwellings.

Accuracy

Results based on the total weighted sample of respondents are subject to a maximum margin of error of plus or minus 2.5% (at the 95% confidence level). This means, for example, that had we found 50% of respondents had blue eyes, we could by 95% sure of getting the same result had we interviewed everyone in the population who was eligible to complete the survey – give or take 2.5%.

The maximum margin of error based on sub-samples of respondents will be larger and dependent on the size of each sub-sample.

Literature review

To provide context to the survey results, a review of the national and international literature on the population-based, socio-economic, technological and media changes that had occurred since 1990 was completed. This may also be found in the e-report for this research.

