

Broadcasting Standards Authority Public Awareness

- online survey



Broadcasting Standards Authority
April 2023



CONTENTS

- Introduction [Slide 3](#)
- Methodology [Slide 4](#)
- Executive Summary [Slide 6](#)
- Snapshot [Slide 10](#)
- Awareness of the complaints process [Slide 11](#)
- Awareness of the BSA [Slide 18](#)
- Awareness of content restrictions/ blocking on television [Slide 24](#)
- Knowledge of filtering technology on different platforms [Slide 30](#)
- Use of filtering technology on different platforms [Slide 35](#)
- Appendix – extra slides [Slide 41](#)

INTRODUCTION

Background

- The Broadcasting Standards Authority | Te Mana Whanonga Kaipāho | Te Mana Whanonga Kaipāho (BSA) is an independent crown entity established under the Broadcasting Act 1989 (the Act). The three key functions of the BSA include:
 - Overseeing the broadcasting standards regime
 - Providing the public with a free and independent complaints service
 - Education and engagement.
- The Act requires all broadcasters to maintain broadcasting standards. For broadcasting standards to be maintained the BSA relies on the New Zealand public to make complaints. Public awareness of the BSA and the complaints process is integral to the overall maintenance of broadcasting standards.
- Every two years the BSA commissions research measuring awareness of the BSA and the complaints process. The following research and report provides the BSA with information on current awareness and knowledge of the BSA and the complaints process, and how well New Zealanders understand the process.

Objectives

- To measure the percentage of New Zealanders aware of the BSA and aware they can make a formal complaint about breaches of broadcasting standards.
 - The BSA's Statement of Performance Expectations (SPE) for the year ending 30 June 2023 includes targets requiring that:
 - at least '65% of New Zealanders are aware of the BSA and that they can make a formal complaint'
 - at least '65% of Māori, Asian and Pasifika communities surveyed are aware of the BSA and the ability to make a complaint'.
- This survey will assess delivery against these objectives.

Methodology

- Results in this report (2023) are based upon questions asked in AKR's nation-wide online omnibus survey. Booster samples were also undertaken to ensure minimum sub-samples for Māori, Pasifika and Asian respondents.
- The fieldwork was conducted from 13 April to 5 May 2023.

Total Sample

- The total sample of n=1185 is made up of a nationally representative sample of respondents. Data from booster samples was merged with the online omnibus data and the data then weighted by age, gender, location, and ethnicity.
- In 2019, 2021 and 2023 awareness and knowledge also included additional sub-sample populations among Māori, Pasifika and Asian respondents. For 2023 the following sub-samples were attained:
 - Māori total sub-sample of n=225
 - Pasifika total sub-sample of n=123
 - Asian total sub-sample of n=157.

Margins of error

- For a sample size of n=1185 the margin of error for a 50% figure at the 95% confidence level is $\pm 2.9\%$.
- For a sample size of n=225 the margin of error for a 50% figure at the 95% confidence level is $\pm 6.5\%$.
- For a sample size of n=123 the margin of error for a 50% figure at the 95% confidence level is ± 8.8 .
- For a sample size of n=157 the margin of error for a 50% figure at the 95% confidence level is ± 7.8 .

Reporting Notes

- Wording of tracked questions differs slightly in the 2021, 2019 and 2017 surveys to that used in the 2014 survey. The differences in the questions were as follows:

Aware can make a formal complaint

- If you are concerned about the content of a programme on radio or television in New Zealand, are you able to make a formal complaint about the programme? *(asked in 2014)*
- If you are concerned about the content of a programme on radio or television in New Zealand, do you know if you are able to make a formal complaint about the programme? *(asked in 2017, 2019 and 2021)* In 2023, Aotearoa New Zealand replaced New Zealand.

Awareness of the BSA

- Before today, have you heard of an organisation called the Broadcasting Standards Authority? *(asked in 2014)*
- Are you aware of the Broadcasting Standards Authority (BSA)? *(asked in 2017, 2019,, 2021)*. In 2023 Te Mana Whanonga Kaipāho was included in the name.

- Questions on filtering technology examples for the various platforms were updated to reflect those currently in place.
- Also, the following platforms were added/ updated to the list for both awareness of filtering technology capability and use of filtering technology:
 - Free video on demand e.g. TVNZ+, ThreeNow
 - Other social media applications e.g. Instagram, Facebook, Snapchat
 - Video based social media platforms e.g. YouTube, Tik Tok (formerly just YouTube)

All numbers are shown rounded to zero decimal places. Hence specified totals are not always exactly equal to the sum of the specified sub-totals. The differences are seldom more than 1%.

- For example: $2.7 + 3.5 = 6.2$ would appear: $3 + 4 = 6$
- Generally, only statistically significant differences are commented on, though this report does include some references to marginal and/or non-statistically significant findings for the ethnic booster samples.

EXECUTIVE SUMMARY

Awareness of BSA

- Just over two thirds of New Zealanders were aware of the BSA, with 68% declared awareness. This was a fall of 7% and continues a downward trend since 2019. This fall may be impacted by the way people are viewing content with major changes during this time, most notably a rise in Netflix viewership and digital media now dominant across under 40-year-olds*.
 - **Māori** (49%), **Pasifika** (38%) and **Asian** (42%) were all less likely to be aware than NZ Europeans (79%).

Awareness and knowledge of the BSA's role

- Those aware of the BSA (n=775) have a good understanding of its role and what it does; describing the BSA in terms of:
 - Handling complaints (34%)
 - Setting/ managing standards (29%)
 - Monitoring content (21%)
 - Reviews and investigates complaints (17%).
 - **Around a quarter of Māori** described the BSA in terms of setting standards (28%) or handling complaints (26%).
 - **Nearly a third of Pasifika (32%)** described BSA as handling complaints, followed by setting standards (27%)
 - **Over a third of Asians (36%)** described BSA in terms of setting standards, followed by monitoring content (29%). Twenty-seven percent said it handles complaints.

Awareness of `Complaints Process

- Around nine out of ten New Zealanders declared they know for sure (61%) or assume they can make a formal complaint (30%) if concerned about the content of a programme on radio or television in Aotearoa. This was similar to 2021 (combined 93%).
 - There has been a shift from those who 'know for sure they can make a complaint' (61%, down 7%) to those who 'assume they can make a complaint' (30%, up 5%).
- Among those who 'know for sure they can make a complaint' by ethnicity:
 - **Māori** had similar levels of awareness of the complaints process, with 58% stating they know for sure (58%) they can make a formal complaint if concerned about programme content
 - **Pasifika** had significantly lower levels of awareness with only 43% sure they can make a formal complaint
 - **Asian** were similar to Pasifika with 42% sure they can make a formal complaint. There were also higher 'Don't know' among Asian respondents compared to other ethnicities.

EXECUTIVE SUMMARY (CONT.)

SOI/SPE measures

- Awareness of the BSA and the complaints process has continued to decline. Although awareness of the ability to make a complaint or ability to find out about the complaint process has remained steady compared to 2021.

SOI/SPE measures tracked					
	2023 (%)	2021 (%)	2019 (%)	2017 (%)	2014 (%)
Aware can make a formal complaint	61	68	84	83	79
Aware could take a course of action that would lead them to finding out about how to make a formal complaint	85	84	91	95	85
Awareness of BSA	68	75	89	92	81

SOI/SPE measures comparing 'All Respondents' with Māori, Pasifika and Asian

- Ratings for all key measures were lower for Māori, Pasifika and Asian:
 - Significantly lower for awareness of the BSA (Māori, Pasifika, Asian)
 - Significantly lower for awareness of the complaint process for Pasifika and Asian respondents.

SOI/SPE measures comparing 'All Respondents' with Māori, Pasifika, and Asian respondents				
	2023 (%) All	2023 (%) Māori	2023 (%) Pasifika	2023 (%) Asian
Aware can make a formal complaint	61	58	43	42
Aware could take a course of action that would lead them to finding out about how to make a formal complaint	85	89	90	73
Awareness of BSA	68	49	38	42

EXECUTIVE SUMMARY (CONT.)

Awareness of content restriction/blocking on television

- Unprompted just over a quarter (29%) were aware of content restriction/blocking processes on television, down 12%. While 71% declared they were not aware of any ways to restrict or block content on television.
 - **Māori** (40%) were more likely to be aware of content restriction/blocking processes on television than other ethnicities
 - **Pasifika** (34%) were similar to all New Zealanders and
 - **Asian** respondents (19%) were significantly less likely to be aware compared to other ethnicities.

Awareness of filtering technology across different platforms

- When asked which platforms were thought to have filtering technology, the following platforms garnered the highest awareness:
 - Subscription video on demand (56%, down 1%)
 - Pay television (48%, down 6%)
 - Web browsers generally (48%, down 4%)
 - Video based social media platforms (41%) [formerly YouTube].

- There was moderate awareness of filtering technology for:
 - Pay per view (34%, down 5%)
 - Other social media applications (34%) [New platform added].
- While awareness was lowest for:
 - Free video on demand (28%) [New platform added]
 - Free-to-air television (24%, down 6%)
- **Māori** and **Pasifika** were more likely to think Subscription video on demand and Pay Television has filtering technology
- **Māori**, **Pasifika** and **Asian** were more likely to think Video based social media and Other social media platforms have filtering technology.

EXECUTIVE SUMMARY (CONT.)

Use of filtering technology across different platforms

Depending on the platforms tested, between 4% (Free to air television) and 13% (Subscription video on demand) of New Zealanders who know filtering or blocking technology exists on that platform know how to use filtering technology *and* personally use it. Findings are generally consistent with 2021, although all are slightly lower.

- Looking at different platforms among those who know how to use it and personally use it, **Māori** and **Pasifika** are more likely to use filtering technology than other ethnicities for:
 - Subscription video on demand
 - Web browsers generally
 - Pay television
 - Video based social media platforms
 - Other social media applications
 - Pay per view
 - Free to air television.

SNAPSHOT



Awareness measures

61%, ↓7%, know for sure of complaints process

58% Māori, 43% Pasifika, 42% Asian

85%, steady, can take action to find out how to complain

89% Māori, 90% Pasifika, 73% Asian

68% ↓7% yes aware of BSA | Te Mana Whanonga Kaipāho

49% Māori, 38% Pasifika, 42% Asian



Content restrictions/blocking on TV – awareness and knowledge

29% ↓12%, yes aware

40% Māori, 34% Pasifika, 19% Asian

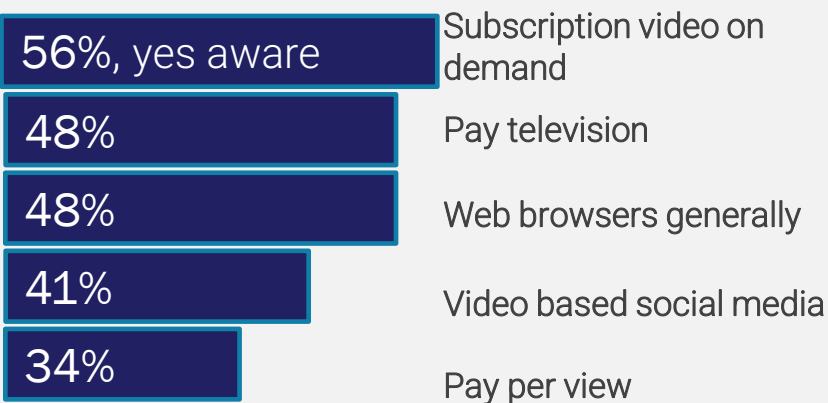
42% ↓3%

Describe content restriction/blocking on TV in terms of using in-built functionality of the service /app e.g. parental control settings in Sky, Netflix, YouTube etc

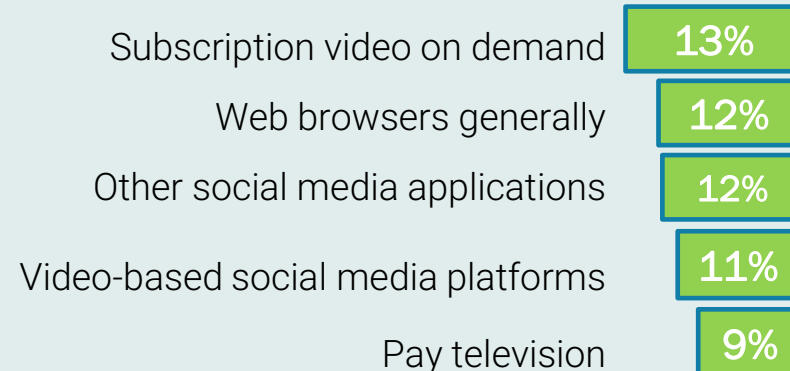
34% Māori, 23% Pasifika, 36% Asian



Filtering technology – knowledge of different platforms 2023



Know how to use and personally use



Awareness of the complaints process



KEY FINDINGS

Awareness of the complaints process

- Around nine out of ten New Zealanders declared they know for sure (61%) or assume they can make a formal complaint (30%) if concerned about the content of a programme on radio or television in Aotearoa. This was similar to 2021 (93%).
 - There was a fall in those who **know for sure** they can make a formal complaint (61%, down 7%) while those who **assume** they can make a formal complaint increased to 30%, up 5%.
- **Awareness of the complaints process by ethnicity** (those who know for sure).
 - **Māori** had similar levels of awareness of the complaints process, with 58% stating they know for sure they can make a formal complaint if concerned about programme content.
 - **Pasifika** had lower levels of awareness with only 43% sure they can make a formal complaint.
 - **Asian** were similar to Pasifika with 42% sure they can make a formal complaint. There were also higher unswers among Asian compared to other ethnicities.

Knowledge of the complaints process (asked of 'All Respondents')

In an open-ended question respondents were asked to describe how they would go about making a formal complaint. Overall, 85% of respondents were aware they could take a course of action that would lead them to finding out about how to make a formal complaint. This was similar to 2021.

Who to contact:

- BSA or similar first port of call (30%), similar to 2021
- 15%, down 3% would contact the broadcaster, while 2% would contact the broadcaster initially and then follow-up with the BSA if not satisfied with broadcaster response.

Process followed:

- 29% (similar to 2021) would look for information on the internet/website, write an email, make a complaint online, or contact the Ombudsman or organisation other than the BSA or broadcaster
- 16% (similar) would provide programme details and reasons for the complaint (offensive/ standards breached) and 14% (down 4%) would provide details of time, date and channel of the breach.

Knowledge of complaints process by ethnicity:

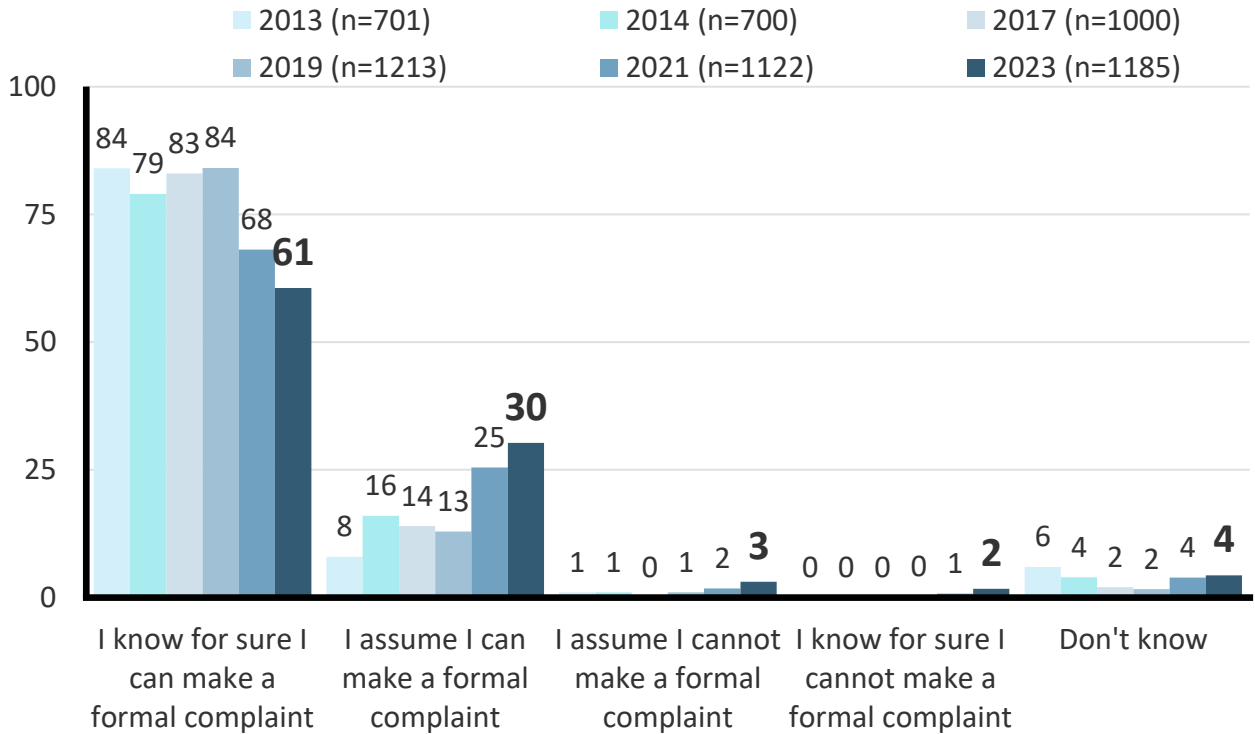
- Māori (22%), Pasifika (11%) and Asian (25%) were all less likely to mention the BSA
- High levels of unswers among Asian (27%).

AWARENESS TRACKING - HIGH AWARENESS OF COMPLAINTS PROCESS



If you are concerned about the content of a programme on radio or television in Aotearoa New Zealand, do you know if you are able to make a formal complaint about the programme? (%)

*question asked in 2014 was slightly different from that asked in 2017 and 2019



Older respondents more likely to know for sure they can make a formal complaint

- Under 30 37%
- 30-44: 55%
- 45-59: 67%
- 60+: 78%

Those less likely to know for sure they could make a formal complaint:

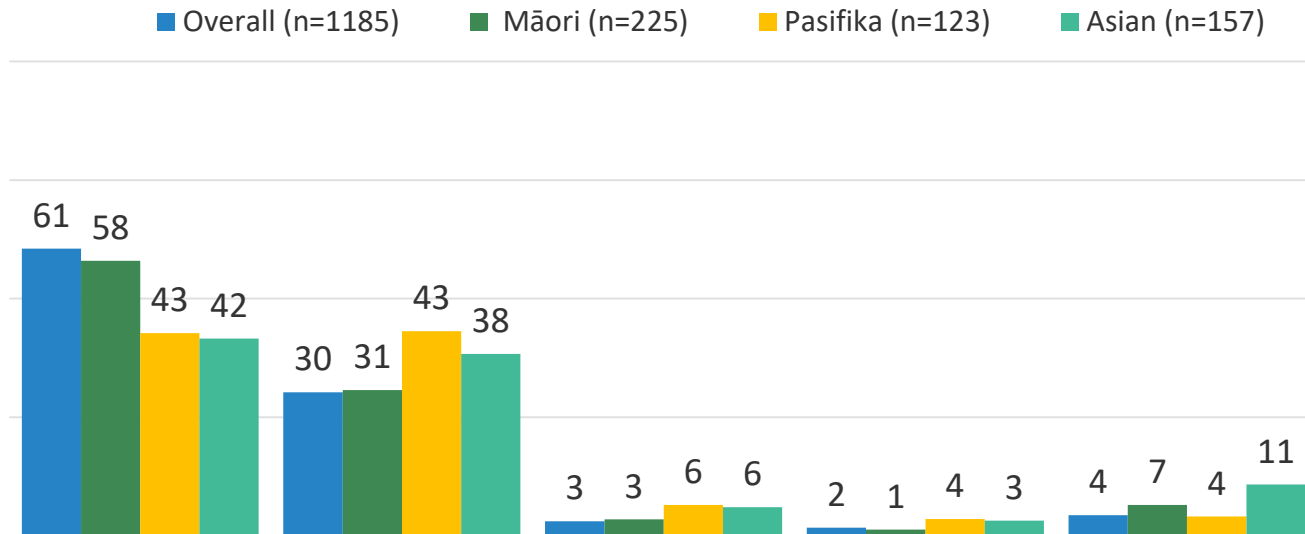
- Aucklanders (53%)
- Those with dependent children (54%)

Those more likely to assume they cannot make a formal complaint:

- Under 30 (8%), renting (5%), living in a rural area (6%)

AWARENESS BY ETHNICITY - LOWER AWARENESS OF COMPLAINTS PROCESS AMONG PASIFIKA AND ASIAN

Q If you are concerned about the content of a programme on radio or television in Aotearoa New Zealand, do you know if you are able to make a formal complaint about the programme? (%)



Pasifika (43%) and Asian (42%) are less likely to know for sure they could make a formal complaint compared to NZ Europeans (67%) and Māori (58%).

Pasifika (43%) and Asian (38%) are more likely to assume they could make a formal complaint compared to NZ European.

KNOWLEDGE OF COMPLAINTS PROCESS AND WHO TO CONTACT - AROUND FOUR IN TEN WOULD CONTACT THE BSA OR THE BROADCASTER




Let's assume you are able to make a complaint and you decide you want to make a complaint about a TV or radio programme. Please write down everything you know about how to go about making a formal complaint, including any details about who to complain to, what information you have to provide and what the process is once you have made a complaint? (% coded)

KNOWLEDGE OF COMPLAINTS PROCESS		%
	Contact/complain to BSA/Broadcasting Standards Authority/Association	18
	Write/email/fax to complain to BSA/Broadcasting Standards Authority/Association	14
Contact BSA or similar	Contact/complain to Broadcasting/Complain/Authority/Body/Board/Committee	5
	Contact/complain to Broadcasting commission/Broadcasting Standards commission	3
	Contact/complain to Broadcasting (Complaints) Tribunal	1
	NET	30
Contact Broadcaster	Write/email/fax to complain to broadcaster/TV/radio channel/Station concerned (inc Sky)	12
	Contact/complain to broadcaster/TV/radio channel/station concerned	12
	NET	15
Contact the broadcaster first/if not happy contact BSA		2


KNOWLEDGE OF COMPLAINTS PROCESS		%
	Would check details/information on internet/website (inc NZ on Air, BSA, TVNZ, TV3)	23
Other methods of complaining	Write/email/fax the appropriate body/ombudsmen	5
	Complaint can be made online/through website	4
	Phone the appropriate body/ombudsman	1
	Contact the appropriate body/ombudsmen	1
	NET	29
Other aspects	Provide relevant programme/programme details/why offensive/which standards breached	16
	Provide details time/date/channel	14
	Ads/information advertised regularly on TV/radio	7
	Provide your details	3
	Need to make complaint within 20 days	2
	Need to make complaint within a certain timeframe/specified time	1
	Other	1
	NET	34
Don't know/don't know any other details		15

KNOWLEDGE OF COMPLAINTS PROCESS TRACKING - BOTH CONTACTING THE BSA AND OTHER METHODS OF COMPLAINING WERE THE MAIN WAYS TO ADDRESS A COMPLAINT, SIMILAR TO 2021

 *Let's assume you are able to make a complaint and you decide you want to make a complaint about a TV or radio programme. Please write down everything you know about how to go about making a formal complaint, including any details about who to complain to, what information you have to provide and what the process is once you have made a complaint? (% coded)*

	2013 (n=701) %	2014 (n=700) %	2017 (n=1000) %	2019 (n=1213) %	2021 (n=1122) %	2023 (n=1185) %
Contact BSA or similar	38	31	41	40	29	30
Other methods of complaining	25	39	32	35	28	29
Provide relevant programme/programme details/why offensive/which standards breached	26	24	23	30	17	16
Contact broadcaster	20	15	16	17	18	15
Provide details time/date/channel	25	23	22	29	18	14
Ads/information advertised regularly on TV/radio	15	12	11	10	10	7
Don't know/don't know any other details	9	15	5	9	16	15

KNOWLEDGE OF COMPLAINTS PROCESS BY ETHNICITY - MĀORI, PASIFIKA AND ASIAN LESS LIKELY TO CONTACT BSA

 Let's assume you are able to make a complaint and you decide you want to make a complaint about a TV or radio programme. Please write down everything you know about how to go about making a formal complaint, including any details about who to complain to, what information you have to provide and what the process is once you have made a complaint? (% coded)

	Overall (n=1185) %	Māori (n=225) %	Pasifika (n=123) %	Asian (n=157) %
Contact BSA or similar	30	22	11	25
Other methods of complaining	29	29	29	26
Provide relevant programme/programme details/why offensive/which standards breached	16	16	21	16
Contact broadcaster	15	15	16	19
Provide details time/date/channel	14	14	14	10
Ads/information advertised regularly on TV/radio	7	14	5	3
Don't know/don't know any other details	15	11	10	27

Awareness of the BSA



KEY FINDINGS

Awareness of the BSA

- Around two thirds (68%) declared awareness of the BSA. This was a fall of 7% and 21% since 2019.
- **Awareness of the BSA by ethnicity**
 - **Māori** (49%), **Pasifika** (38%) and **Asian** (42%) were all less likely to be aware than NZ Europeans (79%).

Knowledge of the BSA (asked of those aware of the BSA, n=775)

In an open-ended question respondents aware of the BSA were asked to describe what they know about the BSA, its role and what it does:

- Handles complaints (34%), up 11%
- Set/ manages standards (29%), up 15%
- Monitors/ regulates content (21%) down 11%
- Few said they knew nothing (9%, down 6%).

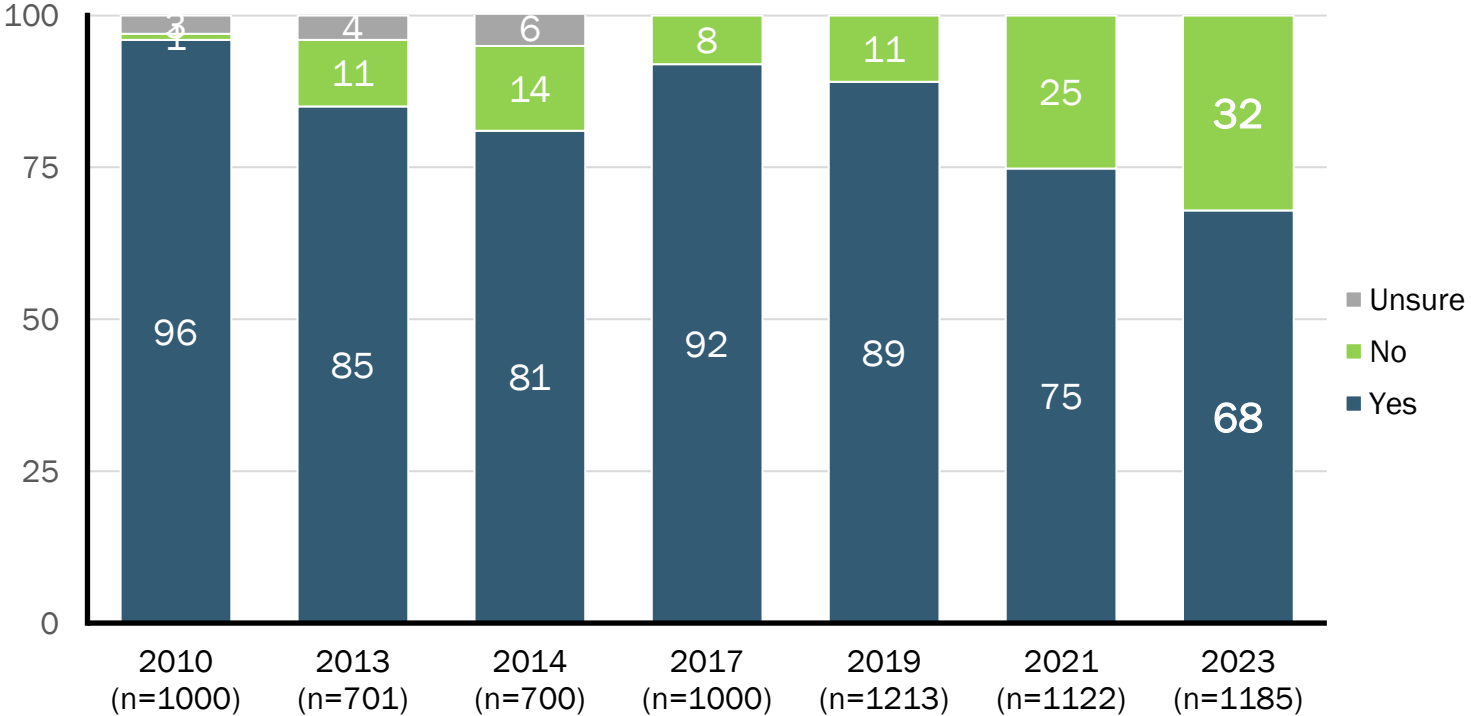
Knowledge of BSA by ethnicity (asked of those aware of BSA)

- **Around a quarter of Māori a piece** described the BSA in terms of setting standards (28%) or handling complaints (26%).
- **Nearly a third of Pasifika (32%)** described BSA as handling complaints, followed by setting standards (27%).
- **Over a third of Asians (36%)** described BSA in terms of setting standards, followed by monitoring content (29%). Twenty-seven percent said handles complaints.

AWARENESS OF BROADCASTING STANDARDS AUTHORITY - CONTINUING DOWNWARD TREND SINCE 2017; 68% AWARE, DOWN 7%



Are you aware of the Broadcasting Standards Authority | Te Mana Whanonga Kaipāho (BSA)? (%)



More likely to be aware of BSA:

- Men (72%) compared to women (64%)
- Older:
 - 60+: 88%
 - 45-59: 77%
 - 30-44: 65%
 - Under 30: 35%
- Homeowners with (75%)/without (80%) a mortgage
- Those with incomes over \$100K (74%)

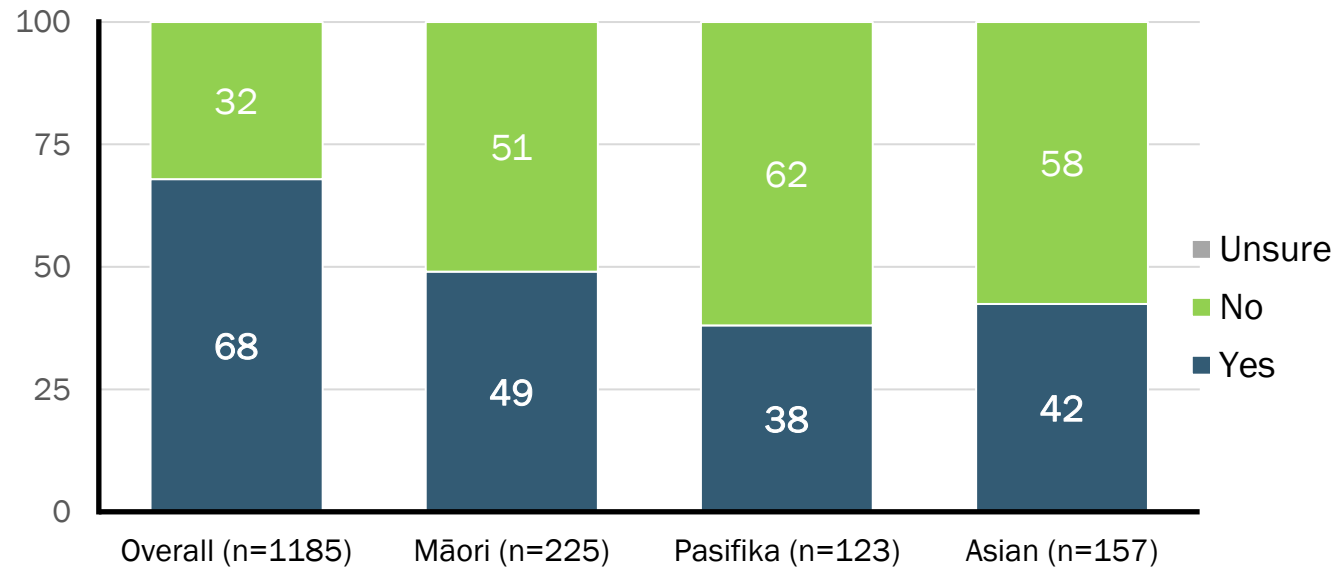
Less likely to be aware of BSA:

- Aucklanders (62%), those with dependent children (63%) and those living in rural areas (61%)

AWARENESS OF BSA BY ETHNICITY - AWARENESS OF BROADCASTING STANDARDS AUTHORITY LOWER AMONG MĀORI, PASIFIKA AND ASIAN



Are you aware of the Broadcasting Standards Authority | Te Mana Whanonga Kaipāho (BSA)? (%)

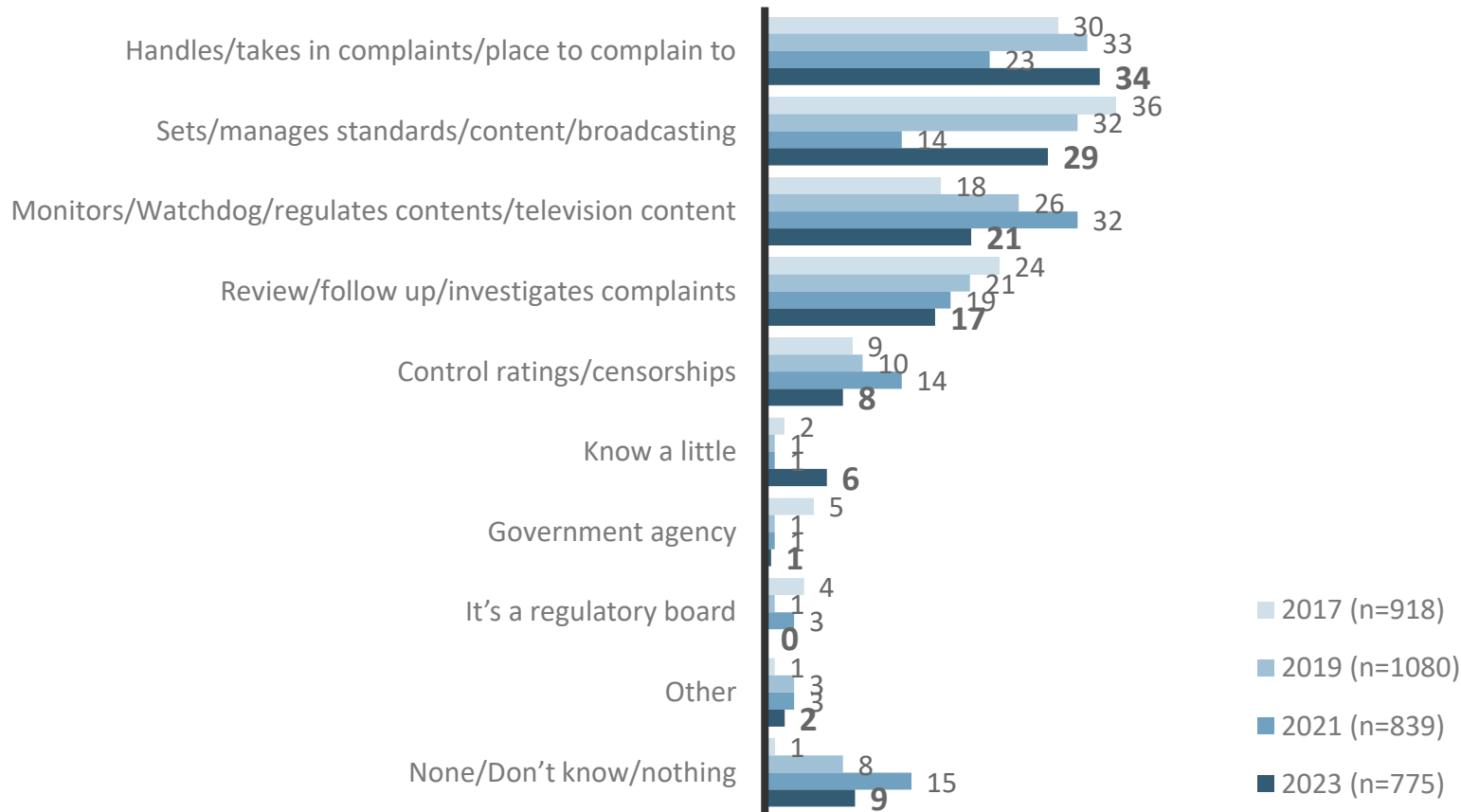


Māori, Pasifika and Asians all less likely to be aware of BSA

KNOWLEDGE OF BROADCASTING STANDARDS AUTHORITY TRACKING - MAJORITY DESCRIBE BSA ROLE AS HANDLING COMPLAINTS OR SETTING/MANAGING STANDARDS



Please describe, in as much detail as you can, what you know about the Broadcasting Standards Authority | Te Mana Whanonga Kaipāho (BSA). What is the BSA's role and what does the BSA do? (% coded)



Less likely to say BSA handles complaints:
Under 30: (17%) compared to older age groups.

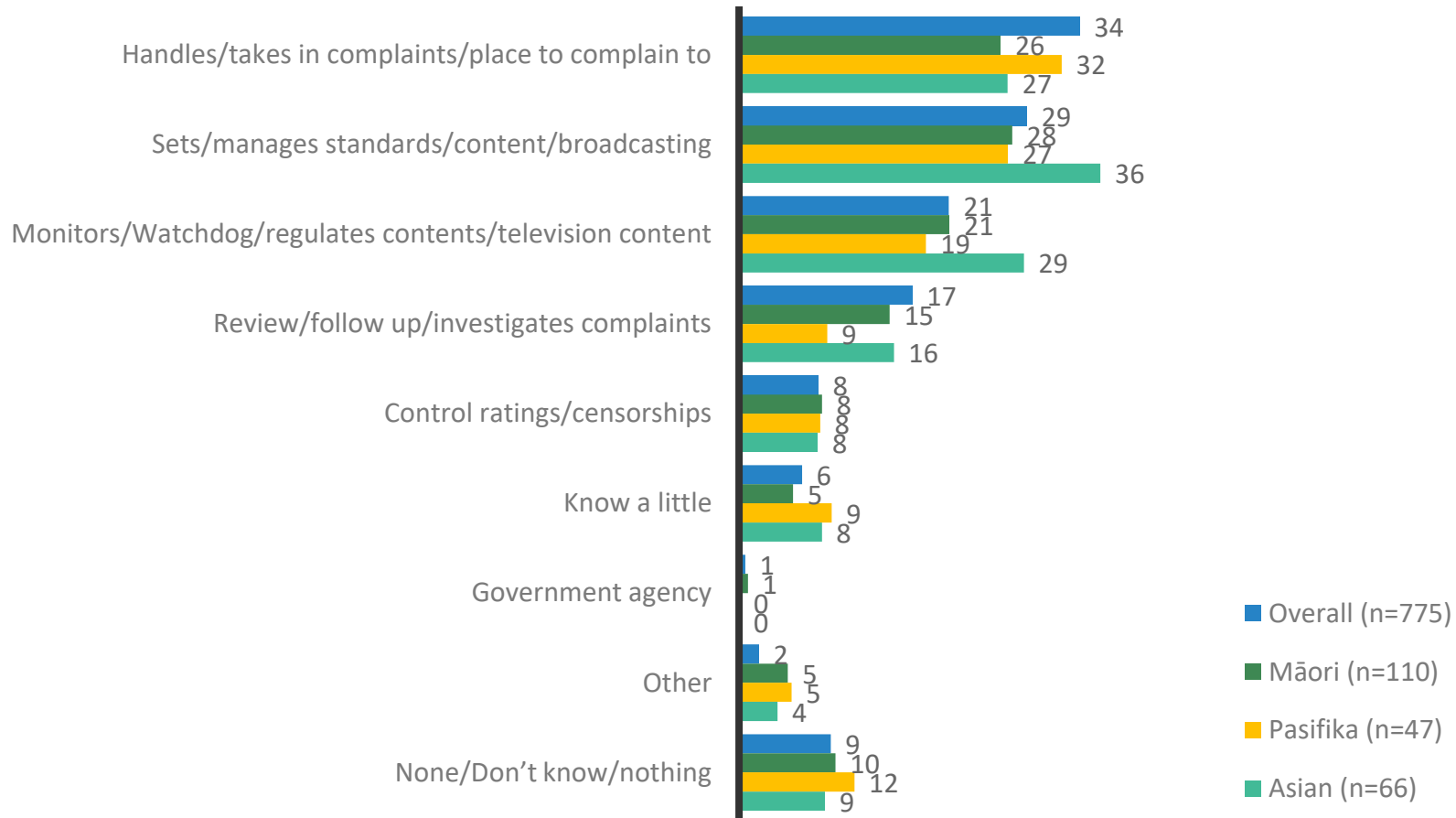
30-44 year olds more likely to say that BSA sets standards (39%).

Males are less likely to say that BSA monitors contents (watchdog) 16% compared to females (27%).

KNOWLEDGE OF BROADCASTING STANDARDS AUTHORITY BY ETHNICITY – SIMILAR TO ‘ALL RESPONDENTS’



Please describe, in as much detail as you can, what you know about the Broadcasting Standards Authority | Te Mana Whanonga Kaipāho (BSA). What is the BSA’s role and what does the BSA do? (% coded)



Base: Asked of those who are aware of the Broadcasting Standards Authority

**Awareness of content
restriction/ blocking on
television . . .**

KEY FINDINGS

Awareness of content restriction/blocking processes on television

- There was a decline in those aware of ways to restrict or block access to content on television. Just over a quarter (29%) were aware, down 12%.
 - **Māori** (40%) were more likely to be aware of filtering technology than other ethnicities
 - **Pasifika** (34%) were similar to all New Zealanders and
 - **Asian** respondents (19%) were significantly less likely to be aware compared to other ethnicities.

Knowledge of how to use content restriction /blocking processes on television (asked of those aware of content restriction/blocking processes on television), n=350)

In an open-ended question respondents were asked to describe how they would restrict or block access to content on television.

- There was little change to the actions mentioned, with the main action mentioned:
 - Use the built-in functionality of the service/app (42%, down 3%)
 - Add a PIN / password to specific content (17%, down 2%)
 - Use the in-built features on the TV (14%, down 2%).

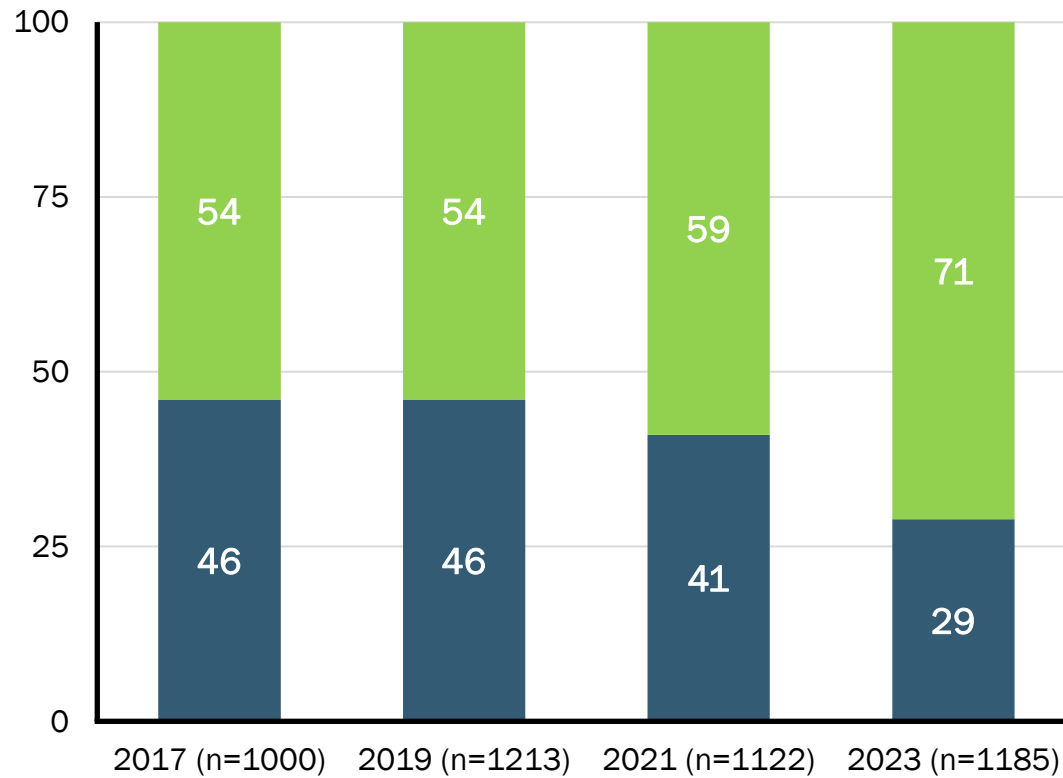
Knowledge of how to use content restriction /blocking processes on television by ethnicity (asked of those aware of content restriction/blocking processes on television)

- **Around a third of Māori (34%)** would use built-in functionality of service /app, followed by adding a PIN/password to specific content (16%). 13% would use the in-built feature on the TV, while 9% were unsure.
- **Just under a quarter of Pasifika (23%)** would use built-in functionality of service/app, while 16% were unsure. 13% would add a PIN/password to specific content.
- **Over a third of Asians (36%)** would use built-in functionality of service/app, followed by using the in-built feature on the TV (22%) and 18% were unsure.

AWARENESS OF CONTENT RESTRICTION/BLOCKING ON TELEVISION TRACKING - JUST OVER A QUARTER AWARE OF CONTENT RESTRICTION/BLOCKING PROCESSES, DOWN 12%



Are you aware of any ways in which you can restrict or block access to content on television? (%)



More likely to be aware of content restriction/blocking processes:

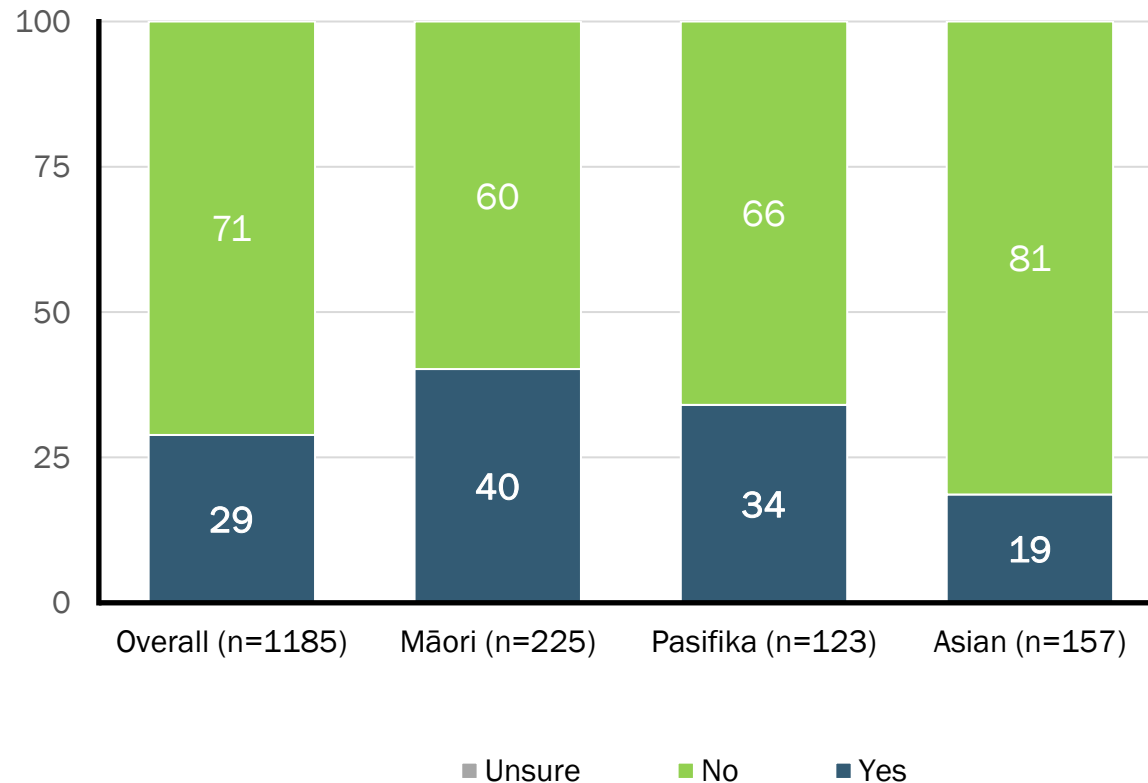
- Those living in Wellington (39%)
- Those living in rural areas (38%).

■ No ■ Yes

AWARENESS OF CONTENT RESTRICTION/BLOCKING ON TELEVISION BY ETHNICITY- HIGHER AWARENESS AMONG MĀORI, LOWER AMONG ASIAN



Are you aware of any ways in which you can restrict or block access to content on television? (%) -



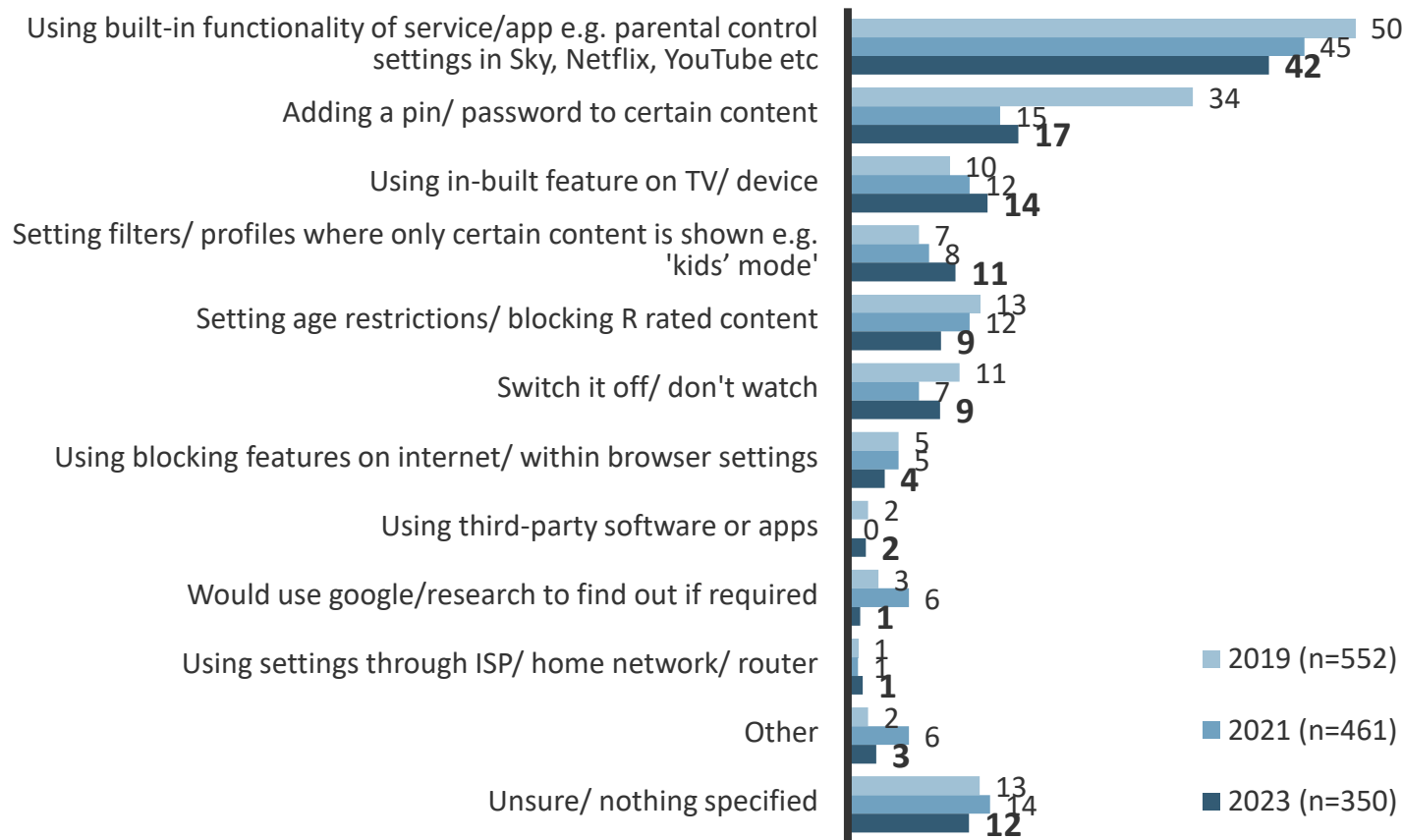
Māori were more likely to be aware of content restriction/blocking processes:(40%) compared to other ethnicities.

Asians were less likely to be aware of content restriction/blocking processes:(19%) compared to other ethnicities

KNOWLEDGE OF CONTENT RESTRICTION/BLOCKING PROCESS TRACKING – USING BUILT-IN FUNCTIONALITY AND ADDING A PIN MAIN WAYS TO RESTRICT ACCESS TO CONTENT



Please describe, in as much detail as you can, how you can restrict or block access to content on television? (% coded)



Under 30 (6%) less likely to add a pin/password compared to 45-59 year olds (29%)

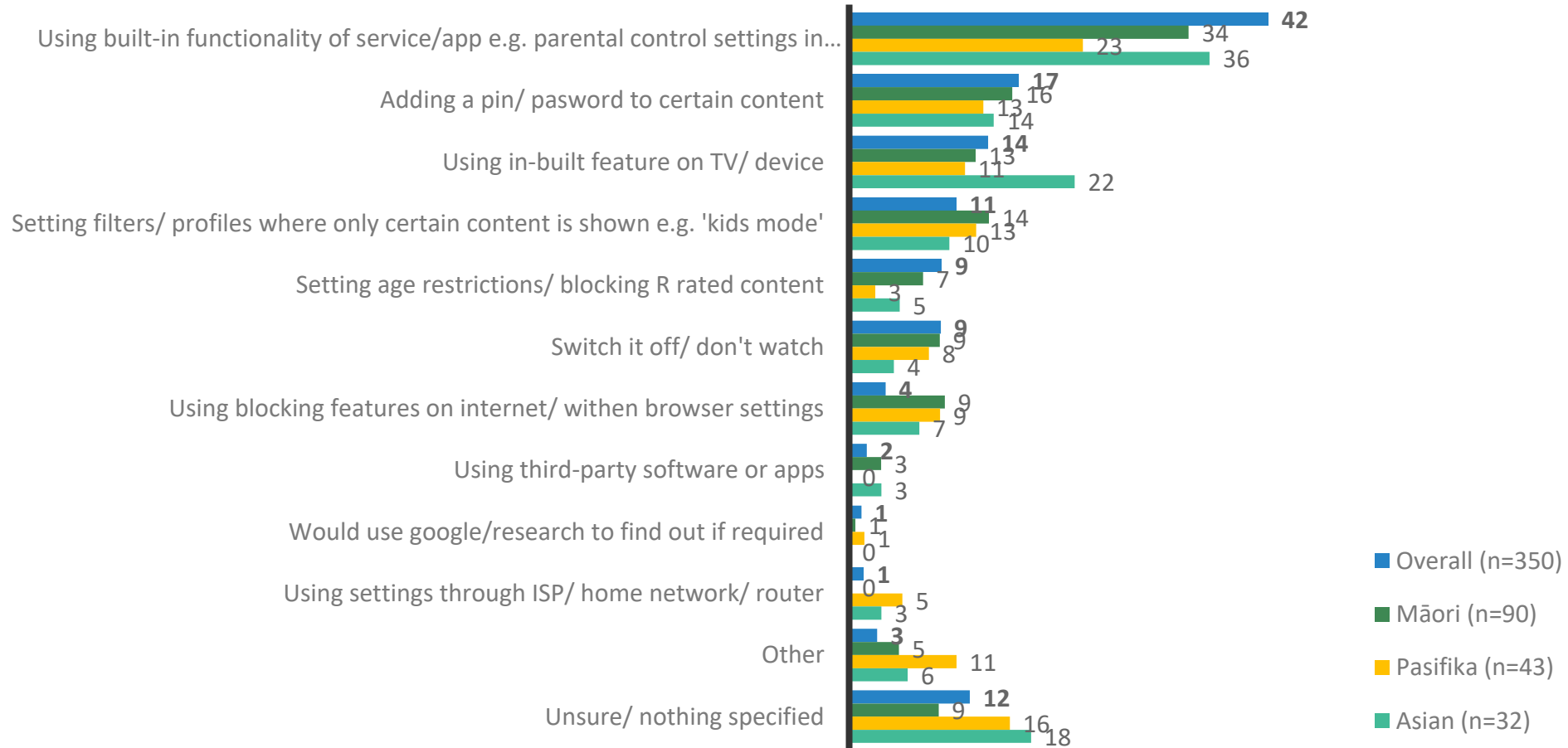
Those with household income over \$100,000 more likely to add a pin/password (28%).

Base: Asked of those who are aware of ways to restrict or block access to content on television (Approximately n=400)

KNOWLEDGE OF CONTENT RESTRICTION/BLOCKING PROCESS BY ETHNICITY - AROUND A THIRD OF MĀORI AND ASIANS USE BUILT-IN FUNCTIONALITY OF THE SERVICE, AROUND A QUARTER OF PASIFIKA



Please describe, in as much detail as you can, how you can restrict or block access to content on television? (% coded)



Base: Asked of those who are aware of ways to restrict or block access to content on television

**Knowledge of filtering
technology on different
platforms . . .**

KEY FINDINGS

Knowledge of filtering technology on different platforms

- A majority thought that Subscription video on demand **had** filtering technology (56%), while over a third (37%) were unsure. This was similar to 2021.
 - Conversely, just under a quarter (24%) thought Free-to-air television **did not have** filtering technology, while 57% were unsure. Nineteen percent thought it did, down 6%.
-
- Just under a majority thought Pay television (48%, down 6%) **had** filtering technology. Forty-six percent were unsure.
 - Also 48% considered Web browsers generally **had** filtering technology, down 4%. 37% were unsure.
 - Forty-one percent thought Video based social media platforms **had** filtering technology and 44% were unsure. This was a new platform added this year.
 - Around a third a piece thought Pay per view (34%, down 5%) and Other social media applications (34%) (New this year) **had** filtering technology. Both had high unswers; 58% and 48% respectively.
 - Over a quarter (28%) thought Free video on demand **had** filtering technology, while a majority were unsure.
 - Note there were high unswers for all platforms with at least a third unsure. Highest unswers were for Pay per view (58%), Free video on demand (57%) and Free-to-air television (57%).

Looking at main platforms thought to have filtering technology that were significantly higher than 'All Respondents' by ethnicity

- Among Māori these were:
 - Subscription video on demand (65%)
 - Web browsers generally (64%)
 - Pay television (59%)
 - Video based social media platforms (58%)
 - Other social media platforms (48%).
- Among Pasifika these were:
 - Subscription video on demand (71%)
 - Video based social media platforms (68%)
 - Other social media platforms (63%)
 - Pay television (61%).
- Among Asian these were:
 - Video based social media platforms (51%)
 - Other social media platforms (43%).
- Demographic differences by platform are summarised in the appendix.

2023 KNOWLEDGE OF FILTERING TECHNOLOGY ON DIFFERENT PLATFORMS – MAJORITY DECLARE SUBSCRIPTION VIDEO ON DEMAND HAS FILTERING TECHNOLOGY, FOLLOWED BY PAY TELEVISION AND WEB BROWSERS GENERALLY

Q Filtering technology/parental control/rating locks are features that allow you to block, or restrict access to, certain media content. Please select which of the following you think have filtering or blocking technology capability? (%)

More likely to think *subscription video on demand* has filtering technology:

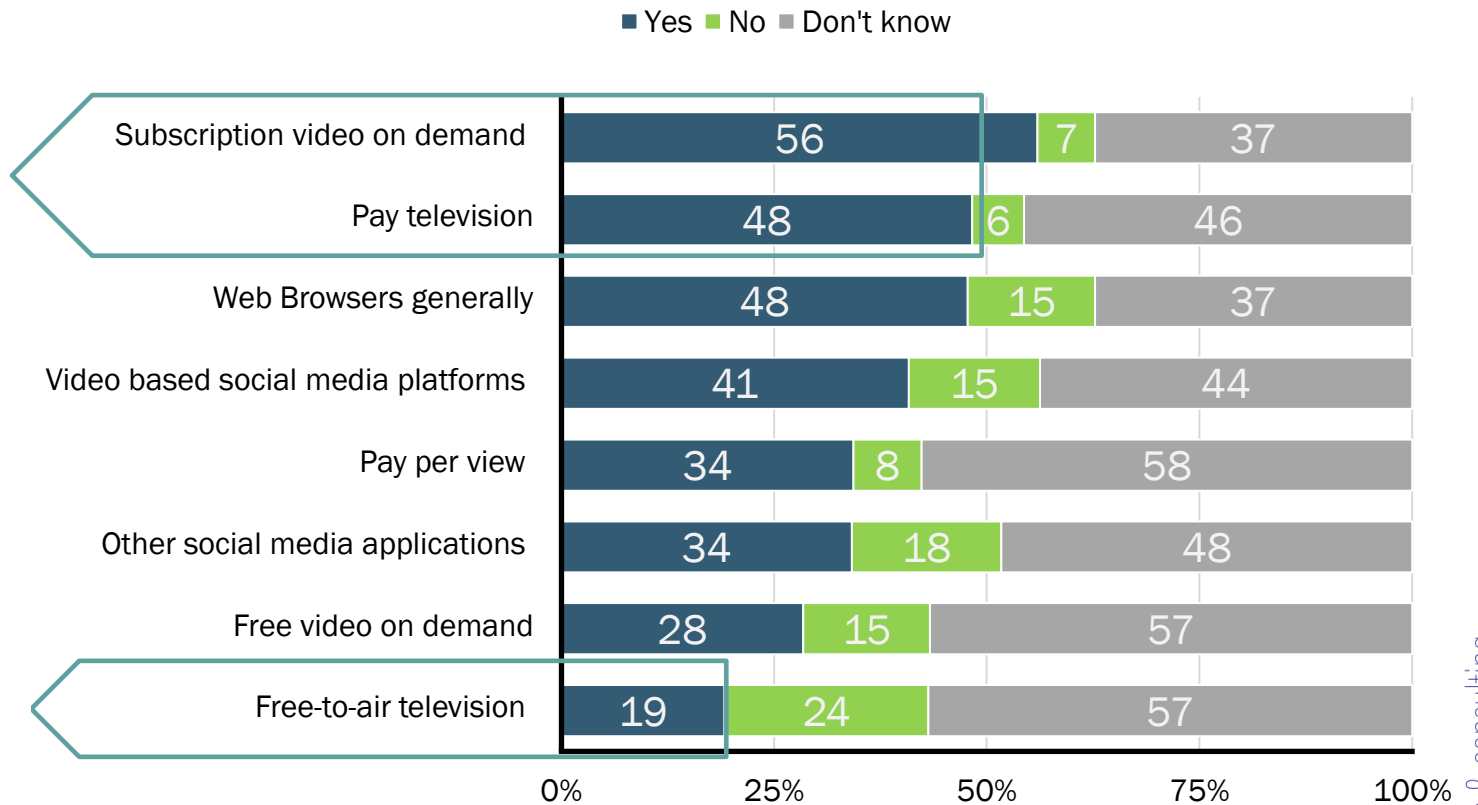
- Women (59%), Under 30 (69%) and 30-44 years (70%) compared to 60+(34%)
- Those with dependent children (71%)
- Those with an income over \$100K (65%)

More likely to think *Pay television* has filtering technology:

- 30-44 years (57%) compared to 60+ (40%)
- Those with dependent children (55%)
- Those with an income over \$100K (54%)

More likely to think *Free-to-air television* has filtering technology:

- Those living in Auckland (23%), Māori (29%), Those with dependent children (23%)

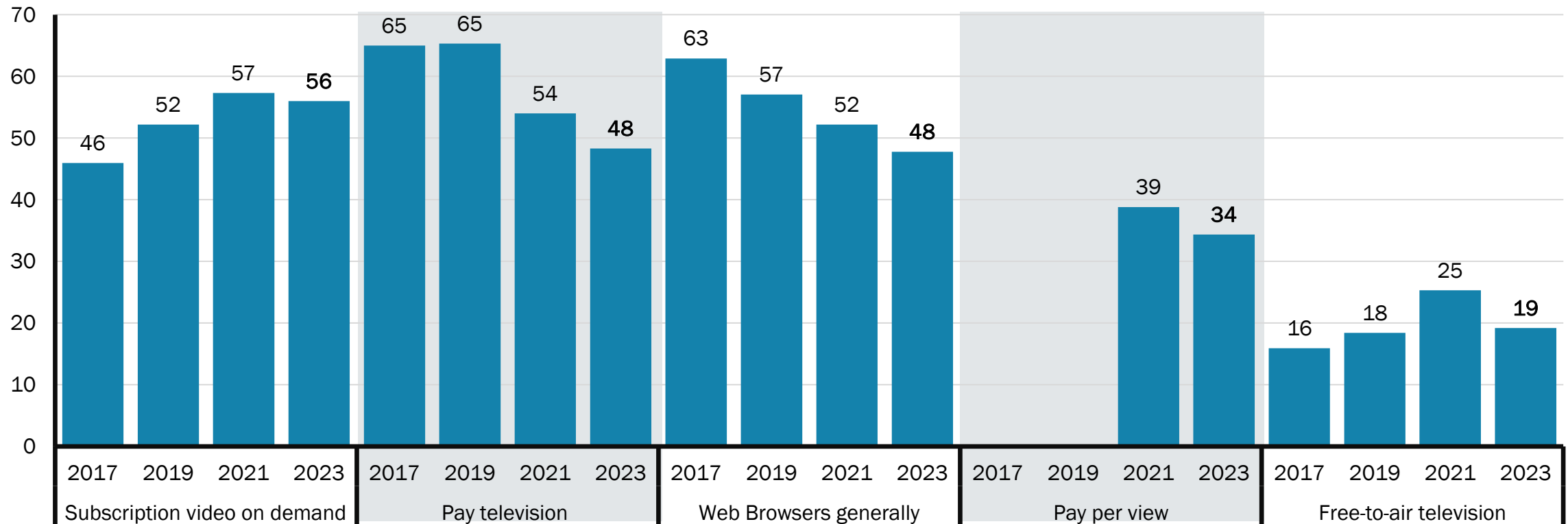


Base: All respondents (n=1185)

KNOWLEDGE OF FILTERING TECHNOLOGY ON DIFFERENT PLATFORMS TRACKING – KNOWLEDGE OF FILTERING TECHNOLOGY WAS STEADY OR FALLING ACROSS THE PLATFORMS TESTED



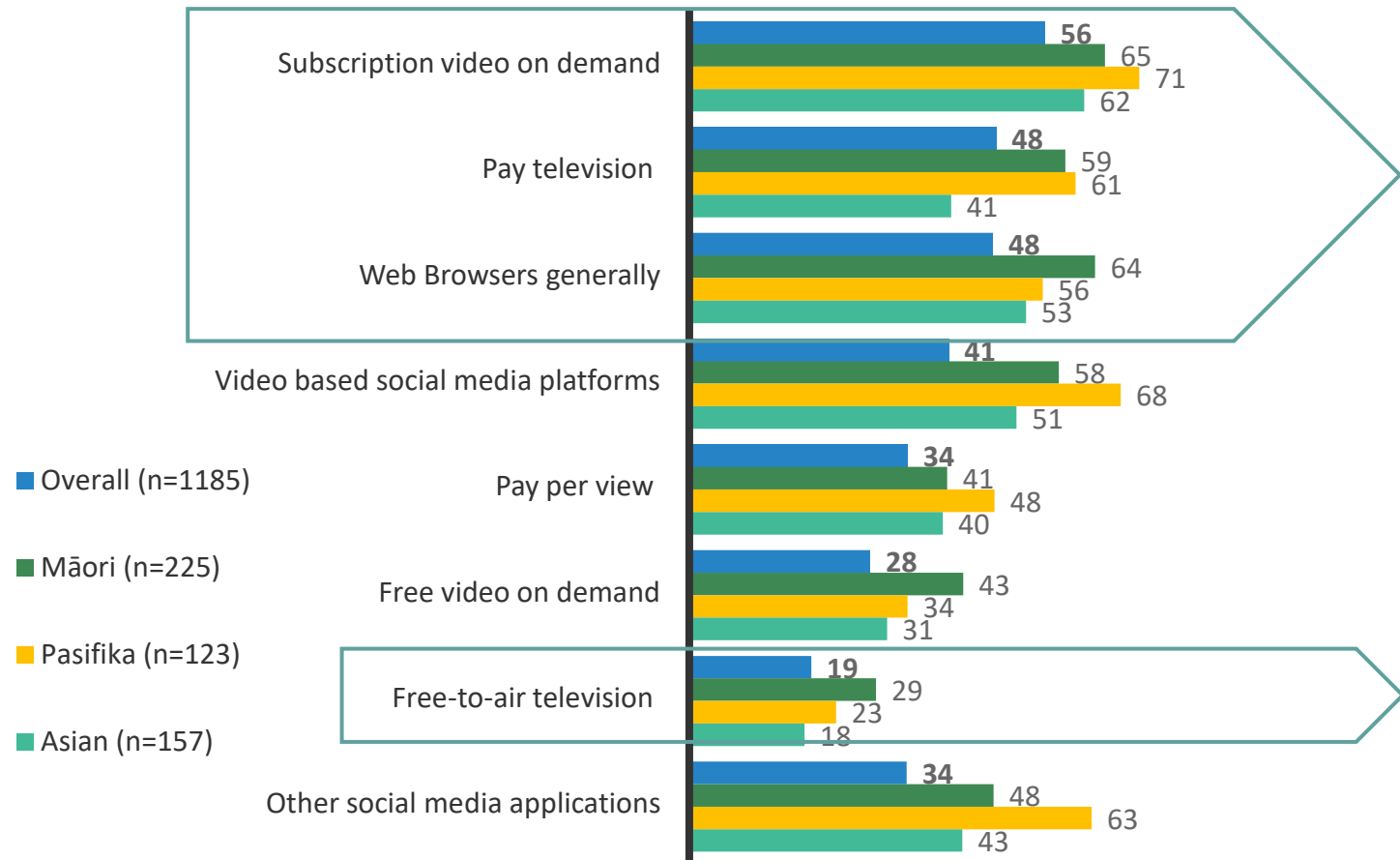
Filtering technology/parental control/rating locks are features that allow you to block, or restrict access to, certain media content. Please select which of the following you think have filtering or blocking technology capability? (% total yes)



KNOWLEDGE OF FILTERING TECHNOLOGY ON DIFFERENT PLATFORMS BY ETHNICITY – MĀORI AND PASIFIKA MORE LIKELY TO THINK THE MAIN PLATFORMS HAVE FILTERING TECHNOLOGY



Filtering technology/parental control/rating locks are features that allow you to block, or restrict access to, certain media content. Please select which of the following you think have filtering or blocking technology capability? (% total yes)



More likely to think Subscription video on demand has filtering technology:

- Māori (65%) and Pasifika (71%) compared to NZ European (52%)

More likely to think Pay television has filtering technology:

- Māori (59%) and Pasifika (61%) compared to NZ European (48%) and Asian (41%).

More likely to think Web Browsers generally have filtering technology:

- Māori (64%) compared to NZ European (45%)

Māori (29%) more likely to think Free-to-air television has filtering technology than NZ European (17%).

Note: Each service had examples and these have changed from previous years; Base: All respondents

Use of filtering technology on different platforms



Use of filtering technology on different platforms

- Highest usage of filtering technology was on the Subscription video on demand platform, followed by web browsers generally and Pay television platform. Lowest usage was on Free video on demand and Free-to-air television platforms.
 - Around a third (35%) said they knew how to use it on Subscription video on demand. This was similar to 2021 (36%). Thirteen percent personally use.
 - Thirty percent said they know how to use it on Web browsers generally, down 5%. Twelve percent personally use.
 - Just over a quarter (27%) said they knew how to use it on Pay television, down 4%. Nine percent personally use.
 - A quarter said they knew how to use it on Video based social media platforms. Eleven percent personally use. This was a new platform added this year.
 - Just under a quarter (23%) said they knew how to use it on Other social media applications. Twelve percent personally use. This replaced YouTube this year.
 - Seventeen percent said they knew how to use it on Pay per view, down 4%. Six percent personally use
 - Only 16% said they knew how to use it on Free video on demand. Five percent personally use. This was a new platform added this year
 - While 11% said they knew how to use it on Free-to-air television, down 5%. Four percent personally use.

KEY FINDINGS

Looking at the main platforms, those who know how to use it and personally use it that were significantly higher than 'All Respondents' by ethnicity

- Among Māori these were:
 - Subscription video on demand (27%, All Respondents 13%)
 - Web browsers generally (27%, All Respondents 12%)
 - Video based social media platforms (27%, All Respondents 11%)
 - Other social media platforms (27%, All Respondents 12%)
 - Pay television (21%, All Respondents 9%)
- Among Pasifika these were:
 - Other social media platforms (33%, All Respondents 12%)
 - Video based social media platforms (28%, All Respondents 11%)
 - Subscription video on demand (26%, All Respondents 13%)
 - Web browsers generally (26%, All Respondents 12%)
 - Pay television (22%, All Respondents 9%)
- There were no significant differences for **Asian respondents**.
- Demographic differences by platform are summarised in the appendix

KNOWLEDGE OF FILTERING TECHNOLOGY – LOW KNOWLEDGE AND AWARENESS OF FILTERING TECHNOLOGY

Q Do you know how to use/set up filtering/blocking technology, and do you personally use blocking or filtering technology on any of the following? (%)

Looking at platforms of interest, those who know how to use it and personally use it are more likely to be:

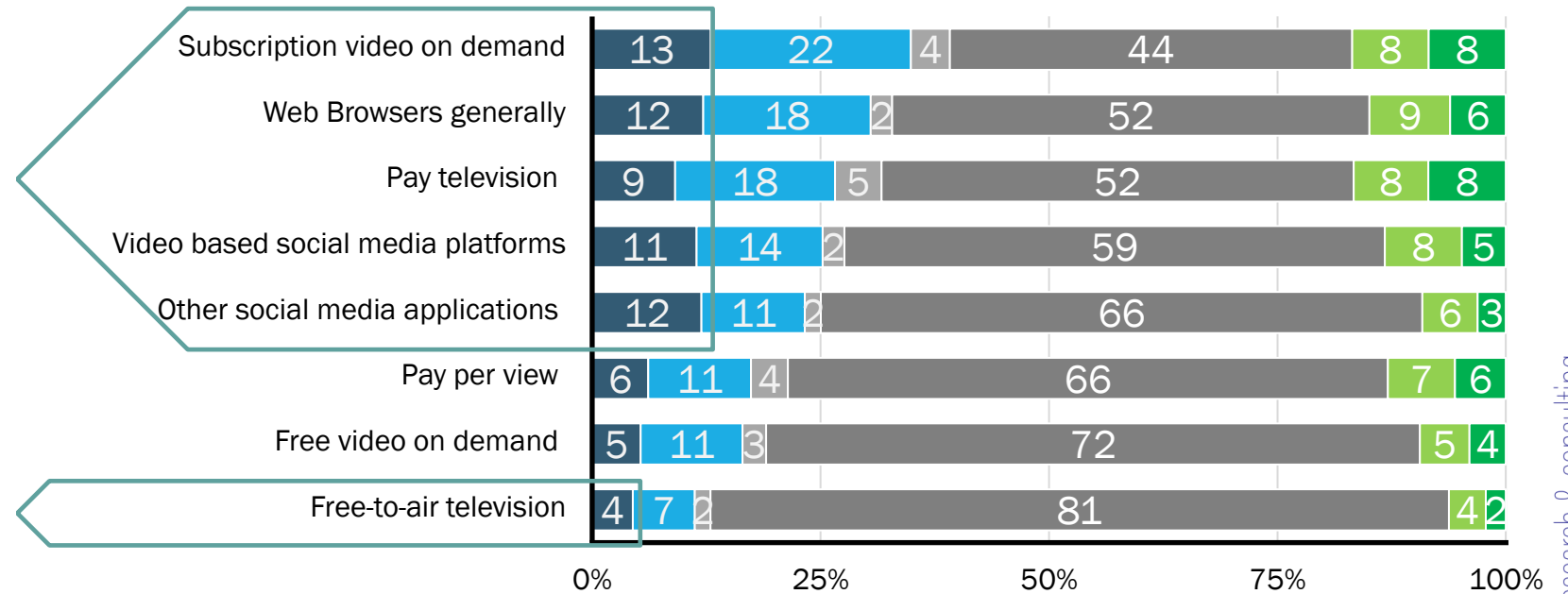
Subscription video on demand
- Under 30 (21%) and 30-44 years (18%), those with dependent children (23%)

Other social media applications
- Women (16%), Under 30 (24%), living in Auckland (15%), those with dependent children (19%)

Video based social media platforms
- Women (15%), Under 30 (25%), living in Auckland (15%), those with dependent children (21%)

Free-to-air television
- Under 30 (8%), those living in Auckland (7%), those with dependent children (7%), those living in rural location (8%)

- Yes, I know how to use it, and I do personally use filtering or blocking technology
- Yes, I know how to use it, but I don't personally use filtering or blocking technology
- Don't Know
- Not aware
- No, I don't know how to use filtering or blocking technology, but if I did know, I would use it
- I don't know how to use filtering or blocking technology, and even if I did I wouldn't use it

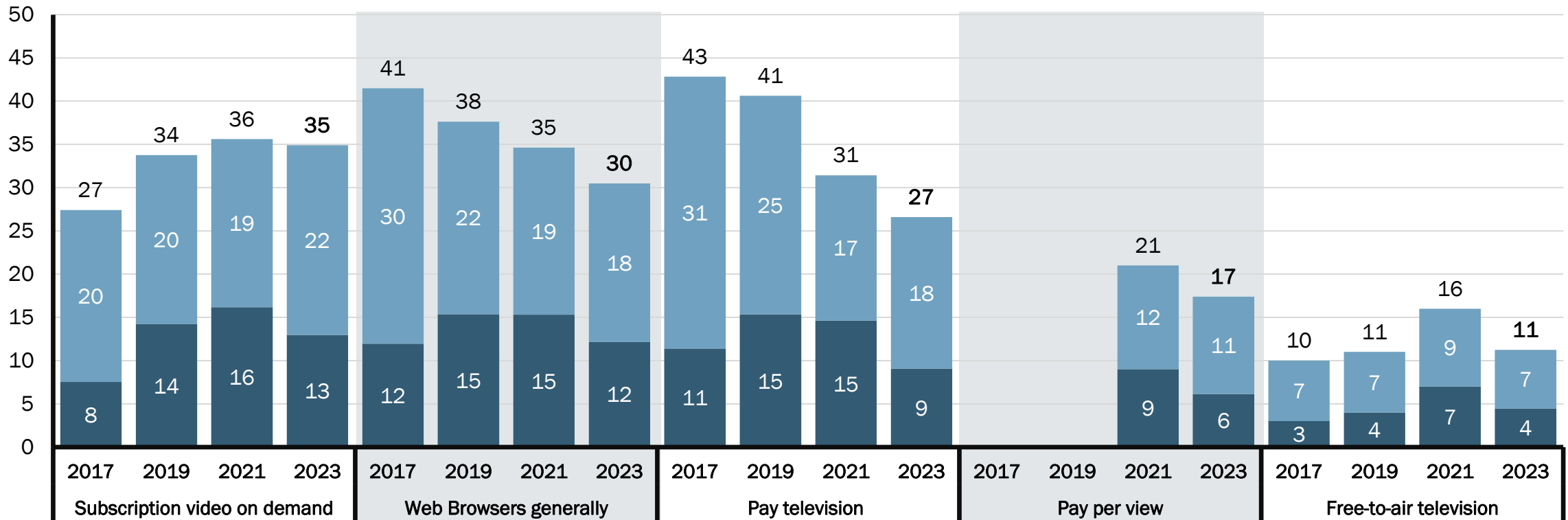


Base: All respondents (n=1185)

KNOWLEDGE OF FILTERING TECHNOLOGY TRACKING – KNOWLEDGE MEASURE STEADY OR DECLINING AMONG THE DIFFERENT PLATFORMS TESTED

Do you know how to use/set up filtering/blocking technology, and do you personally use blocking or filtering technology on any of the following? (%)

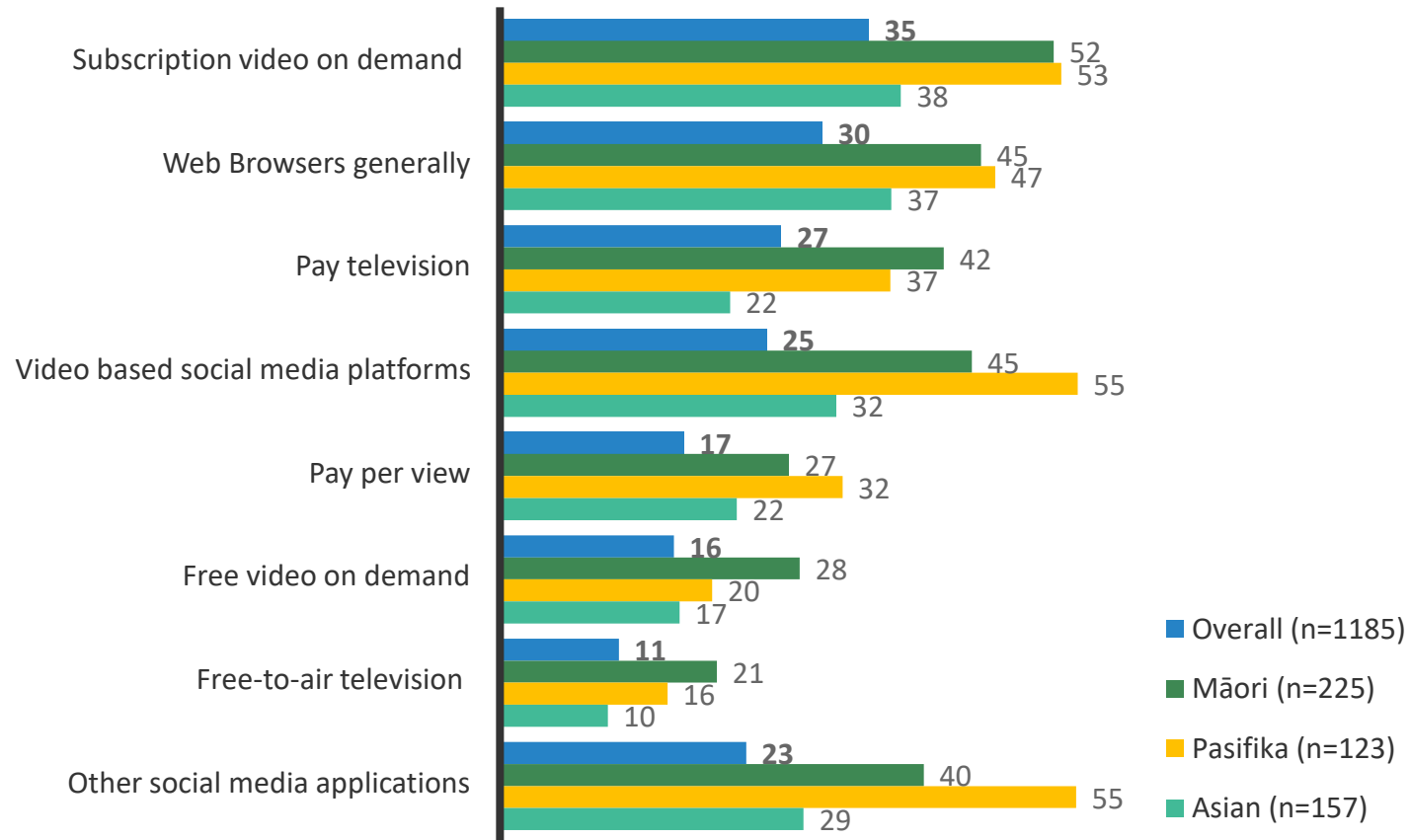
- Yes, I know how to use it, but I don't personally use filtering or blocking technology
- Yes, I know how to use it, and I do personally use filtering or blocking technology



KNOWLEDGE OF FILTERING TECHNOLOGY BY ETHNICITY - MĀORI AND PASIFIKA MORE LIKELY TO USE FILTERING TECHNOLOGY ACROSS MAJORITY OF PLATFORMS TESTED



Do you know how to use/set up filtering/blocking technology, and do you personally use blocking or filtering technology on any of the following? (% Total yes know how to use it)

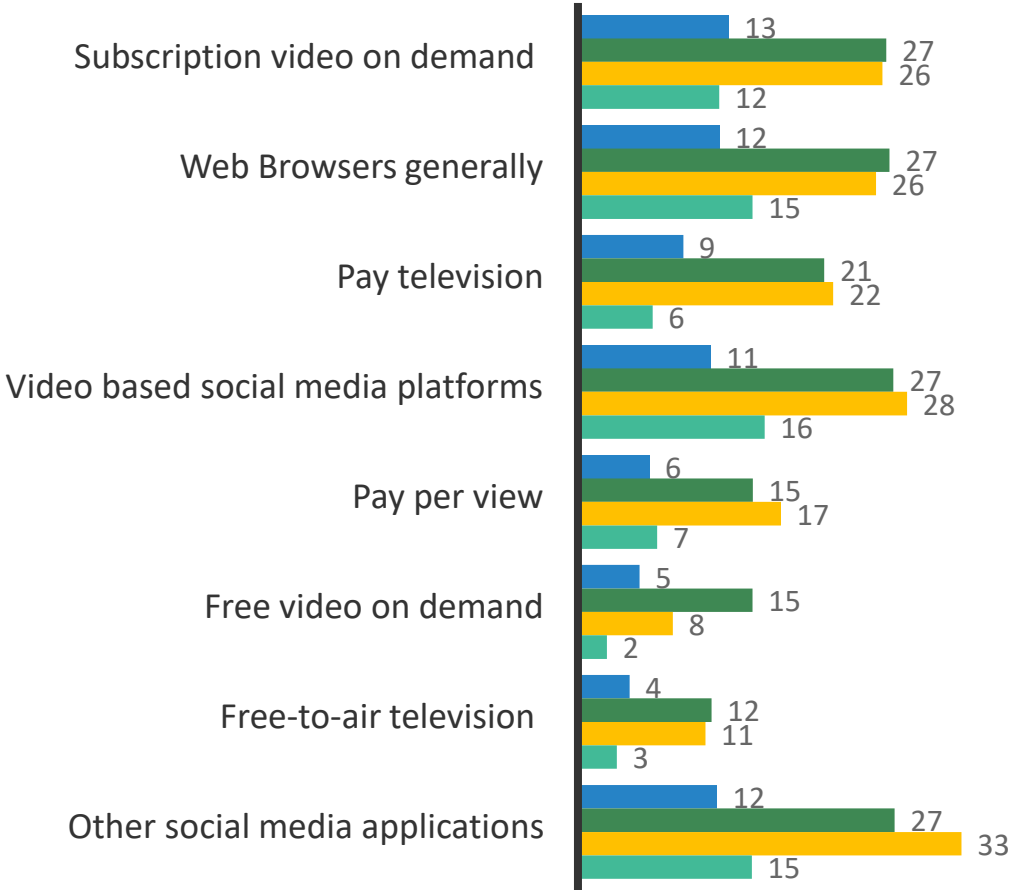


Note: Each service had examples and these have changed from previous years; Base: All respondents

USE OF FILTERING TECHNOLOGY – BY ETHNICITY



Do you know how to use/set up filtering/blocking technology, and do you personally use blocking or filtering technology on any of the following? (% Yes, I know how to use it, and I do personally use filtering or blocking technology)



Looking at the main platforms, Māori and Pasifika are more likely to know how to use AND personally use:

- Subscription video on demand
- Web browsers generally
- Pay television
- Video based social media platforms
- Other social media applications
- Pay per view
- Free-to-air television

- Overall (n=1185)
- Māori (n=225)
- Pasifika (n=123)
- Asian (n=157)

Note: Each service had examples and these have changed from previous years; Base: All respondents

Appendix



FILTERING TECHNOLOGY/PARENTAL CONTROL/RATING LOCKS ARE FEATURES THAT ALLOW YOU TO BLOCK, OR RESTRICT ACCESS TO, CERTAIN MEDIA CONTENT. PLEASE SELECT WHICH OF THE FOLLOWING YOU THINK HAVE FILTERING OR BLOCKING TECHNOLOGY CAPABILITY? (%)

Platform	Demographic difference – More likely to be aware
'Subscription video on demand e.g. Netflix, Neon, Amazon Prime, Disney+, Spark Sport' [56% aware overall]	<ul style="list-style-type: none"> • Women (59%) compared to Men (52%), Under 30 (69%) and 30-44 years (70%) compared to 60+ (34%), Aucklanders (63%), those with an income over \$100K, (65%), those with dependent children (71%), • Māori (65%), Pasifika (71%).
'Pay television e.g. SKY' [48% aware overall]	<ul style="list-style-type: none"> • 30-44 (57%) compared to 60+ (40%), those with an income over \$100K, (54%), those with dependent children (55%), • Māori (59%), Pasifika (61%).
'Web Browsers generally' [48% aware overall]	<ul style="list-style-type: none"> • Under 30 (56%), 30-44 (63%) compared to 60+ (31%), those with an income over \$100K, (53%), those with dependent children (60%), • Māori (64%)
'Video based social media platforms e.g. YouTube, TikTok' [41% aware overall]	<ul style="list-style-type: none"> • Women (45%) compared to Men (36%), Under 30 (59%) and 30-44 (54%) compared to those 60+ (21%), Aucklanders (47%), those with dependent children (53%) • Māori (58%), Pasifika (68%), Asian (51%)
'Pay per view – Google movies / Microsoft movies / Sky Go / iTunes Movies' [34% aware overall]	<ul style="list-style-type: none"> • 30-44 (43%), Aucklanders (43%), those with dependent children (41%) • Pasifika (48%)
'Other social media applications e.g. Instagram, Facebook, Snapchat' [34% aware overall]	<ul style="list-style-type: none"> • Under 30 (52%) and 30-44 (39%) compared to 60+ (20%), Aucklanders (41%), those with dependent children (41%) • Māori (48%), Pasifika (63%), Asian (43%)
'Free video on demand e.g. TVNZ+; ThreeNow' [28% aware overall]	<ul style="list-style-type: none"> • Under 30 (36%) and 30-44 (35%) compared to 60+ (19%), Aucklanders (33%), those with dependent children (34%) • Māori (43%)
'Free-to-air television e.g. Freeview, TVNZ 1, Three, Whakaata Māori, Prime,Choice TV, HGTV' [19% aware overall]	<ul style="list-style-type: none"> • Aucklanders (23%), those with dependent children (23%) • Māori (29%)

DO YOU KNOW HOW TO USE/SET UP FILTERING/BLOCKING TECHNOLOGY, AND DO YOU PERSONALLY USE BLOCKING OR FILTERING TECHNOLOGY ON ANY OF THE FOLLOWING? (%) 'YES, I KNOW HOW TO USE IT, AND I DO PERSONALLY USE FILTERING OR BLOCKING TECHNOLOGY'

Platform	Demographic difference – More likely to know how to use and to personally use
'Subscription video on demand e.g. Netflix, Neon, Amazon Prime, Disney+, Spark Sport' [13% know how to use and personally use]	<ul style="list-style-type: none"> Under 30 (21%) and 30-44 (18%) compared to 60+ (2%), those with dependent children (23%), Māori (27%), Pasifika (26%).
'Web Browsers generally' [12% know how to use and personally use]	<ul style="list-style-type: none"> Under 30 (17%) and 30-44 (17%) compared to 60+ (5%), those with dependent children (20%), Māori (27%), Pasifika (26%).
'Other social media applications e.g. Instagram, Facebook, Snapchat' [12% know how to use and personally use]	<ul style="list-style-type: none"> Women (16%) compared Men (8%), Under 30 (24%) compared to 60+ (4%), Aucklanders (15%), those with dependent children (19%) Māori (27%), Pasifika (33%)
'Video based social media platforms e.g. YouTube, TikTok' [11% know how to use and personally use]	<ul style="list-style-type: none"> Women (15%) compared Men (8%), Under 30 (25%) compared to 60+ (1%), Aucklanders (15%), those with dependent children (21%) Māori (27%), Pasifika (28%)
'Pay television e.g. SKY' [9% know how to use and personally use]	<ul style="list-style-type: none"> Aucklanders (13%), those with dependent children (14%), those living in rural areas (14%) Māori (21%), Pasifika (22%).
'Pay per view – Google movies / Microsoft movies / Sky Go / iTunes Movies' [6% know how to use and personally use]	<ul style="list-style-type: none"> Under 30 (12%) compared to 60+ (2%), Aucklanders (10%), those with dependent children (10%) Māori (15%), Pasifika (17%)
'Free video on demand e.g. TVNZ+; ThreeNow' [5% know how to use and personally use]	<ul style="list-style-type: none"> Under 30 (9%), those with dependent children (9%) Māori (15%)
'Free-to-air television e.g. Freeview, TVNZ 1, Three, Whakaata Māori, Prime, Choice TV, HGTV' [4% know how to use and personally use]	<ul style="list-style-type: none"> Under 30 (8%) compared to 60+ (1%), Aucklanders (7%), those with dependent children (7%) Māori (12%), Pasifika (11%)

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