



Public Awareness Online Omnibus Research – Final Report

Broadcasting Standards Authority

June 2021

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Executive Summary

Ensuring New Zealanders are aware of the Broadcasting Standards Authority (BSA) and aware they can make a complaint is a key deliverable for the BSA. Every two years it commissions a survey measuring the percentage of New Zealanders:

- aware of the BSA;
- aware that they can make a formal complaint.

This report analyses the results of the 2021 survey including how the results compare with the results of previous surveys conducted in 2019, 2017 and 2014.

BSA

Awareness of the BSA

Seventy-five percent of New Zealanders are aware of the BSA, a significant 14% decrease compared with 2019. This is also lower than those who said they were aware in 2017 (92%) and 2014 (81%).

Pasifika (57%) and Asian (40%) participants are significantly less likely to be aware of the BSA, compared with Māori (70%) and NZ European (87%).

Awareness and knowledge of the BSA's role

Most of those who are aware of the BSA have a general understanding of the BSA's role:

- 23% identify their role in taking complaints (being the place to complain to); 10% fewer than 2019.
- 19% say the BSA reviews and investigates complaints; similar to 2019.
- 14% say that the BSA sets and manages the broadcasting standards, a significant decrease compared to those who said this in 2019 (32%) and 2017 (36%); and,
- 32% say the BSA 'monitors/regulates content on radio and television/it acts as a watchdog; 6% more than 2019.

Complaints process

Awareness of the complaints process

Ninety-three percent of New Zealanders either:

- know for sure they can take a course of action to make a formal complaint (68%); **or**
- assume they can do so (25%).

While the overall proportion of New Zealanders who know or assume they can make a complaint (93%) is only marginally less than 2019 (97%), a greater percentage of that group assume rather than know they can make a formal complaint.

- Older respondents aged 60+ (82%), non-Māori/Asian/Pasifika respondents (75%), those who are not working (74%), and freehold homeowners (78%) are **more likely to know for sure they could make a formal complaint**. Auckland residents (62%), respondents aged 18-29 (48%) and Asian respondents (44%) are **less likely to know for sure they could make a formal complaint**, compared to 68% overall.

Differences by ethnicity

- Pasifika and Asian respondents are less likely to be aware of the Broadcasting Standards Authority.
- Pasifika respondents are more likely to say they **knew for sure they could not make a formal complaint**.
- Asian respondents are **less likely to know for sure** they can make a formal complaint.
- Asian respondents are also less likely to know they can take a course of action that would lead them to finding out about how to make a formal complaint or to mention the BSA when asked about the process of making a formal complaint.

These findings suggest that work may be required to ensure that these communities are educated and aware of the BSA and can access the BSA complaints system.

SOI/SPE measures

SOI/SPE measures tracked

	2021 %	2019 (%)	2017 (%)	2014 (%)
Aware can make a formal complaint	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	84	91	95	85
Awareness of BSA	75	89	92	81

SOI/SPE measures comparing 'all' New Zealanders with Māori, Pasifika, and Asian respondents

	2021 (%) All	2021 (%) Māori	2021 (%) Pasifika	2021 (%) Asian
Aware can make a formal complaint	68	72	54	44
Aware could take a course of action that would lead them to finding out about how to make a formal complaint	84	87	85	75
Awareness of BSA	75	70	57	40

Considering these findings in the context of New Zealander's changing media habits

We note that this research did not seek to establish if, why or how respondents' media habits have changed or evolved in recent times. However, the findings suggest that the decrease in awareness of the BSA, of the formal complaints procedure and the ability to take a course of action that would lead to finding out how to make a formal complaint may be due, at least in part, to New Zealanders' changing media consumption habits. Specifically, the following key findings from the latest *Where are the Audiences?* report¹ produced by Glasshouse Consulting for NZ On Air confirm New Zealand audiences move away from linear TV platforms to on-demand and other platforms and, potentially, less exposure to BSA communications:

- **Total** linear TV audiences (Free-to-air and Pay TV) have continued to fall.
- The amount of time audiences spend watching linear TV has declined.
- Time spent watching subscription on demand has increased (and is now the second most popular media in terms of time spent).
- The most popular site, station or channel is now You Tube, pipping TVNZ1.
- The group that has moved fastest away from linear TV is Asian New Zealanders (with just 28% consuming linear television).
- Most radio stations have declining daily reach and time spent listening to radio has dropped.

Content restriction / blocking on television

In 2017 and 2019 the BSA tested awareness of the availability of tools to block content (filtering technology). In light of their ongoing work in this area, they wanted to test whether awareness levels had changed.

Overall Awareness

Unprompted, less than half of New Zealanders (41%) are aware of the availability of filtering technology; 5% less than the 46% who were aware in 2019 and 2017.

Content restriction / blocking process

When asked to describe how they can block access to content on television, half (45%) of respondents mention using built-in functionality of the service or app, for example parental control settings, on Sky, Netflix, YouTube etc.; 5% fewer than in 2019. A much lower proportion (12%) mention using an in-built feature on their TV or device; similar to the 10% who said this in 2019.

Adding a pin or password to certain content was mentioned by 15% of respondents, 19% fewer than who said this in 2019 (34%).

Twelve percent are aware they could set age restrictions and / or block R rated content; similar to 2019 (13%).

Awareness of content restriction across different platforms

When prompted about their knowledge of filtering technology across six different platforms, a majority of respondents are aware of filtering technology on Pay television (54%), subscription video on demand (57%) and Web Browsers generally (52%). Awareness is slightly lower for YouTube (49%) and lower still for Pay per

¹ <https://www.nzonair.govt.nz/research/where-are-audiences-2020/>

view movies (39%) and Free to Air TV (25%). Awareness levels generally dropped in this area. However, those for subscription video on demand and Free to Air TV increased since 2019.

Findings indicate that many New Zealanders are unaware of filtering technology on the platforms listed or they do not know if filtering technology exists on these platforms or not.

Generally, younger respondents (18-44), Māori respondents, respondents with dependent children and in paid work, are **more likely to be aware** of filtering technology across the various platforms, while older respondents (60+), those without dependent children and those not working or earning less than \$50k are **less likely to be aware**. [Numbers for each platform tested and demographic differences are provided in Section 2 of the report].

Usage of and content restriction / blocking on television

Depending on the platforms tested, between 7% and 16% 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 consistent with 2019.

Differences by ethnicity

- Māori respondents are generally more aware of filtering technology and are also more likely to personally use filtering/blocking technology across all tested media platforms.
- Unprompted, Asian respondents are less likely to say they are aware of ways to block access to content on television.
- When prompted with specific media platforms, however, Asian respondents are more likely to say they are aware of ways to block content on subscription video on demand and YouTube. They are no more likely to use the blocking technology on these media platforms.

Methodology

Results in this report are based upon questions asked in the UMR Research nation-wide online omnibus survey. The online omnibus is designed to achieve a nationally representative sample of 1000 people, across three key demographics: region, gender, and age.

In each online omnibus survey, we tend to get around 100-110 Māori respondents, 20-30 Pasifika respondents and 70-80 Asian respondents. The overall results are weighted by ethnicity to the 2013 census figures for people 18 years and over.

In 2021 as in 2019, the BSA also wanted to test awareness among Māori, Pasifika, and Asian communities so that they can determine whether further work is required to ensure that these communities are aware of and can therefore access the BSA complaints system.

To get better representation amongst the individual ethnic groups, boosters were applied, and the ethnic sub-samples achieved were n=207 Māori participants, n=71 Pasifika participants and n=145 Asian participants.

Booster samples data was merged with the online omnibus data and the data was then weighted by age, gender, location, and ethnicity.

Fieldwork dates

Fieldwork for the nation-wide omnibus survey was conducted from 20th April to 12th May 2021.

Margins of Error

Nation-wide omnibus - The margin of error for a 50% figure at the 95% confidence level for a sample of n=1122 is approximately $\pm 3.1\%$.

Māori booster - The margin of error for a 50% figure at the 95% confidence level for a sample of n=207 is approximately $\pm 6.8\%$

Pasifika booster - The margin of error for a 50% figure at the 95% confidence level for a sample of n=71 is approximately $\pm 11.6\%$.

Asian booster - The margin of error for a 50% figure at the 95% confidence level for a sample of n=145 is approximately $\pm 8.4\%$.

Reporting Notes

1. 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*)

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 and 2021*)

2. Due to rounding, totals may not always add up to 100%.
3. 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.

Background and objectives

The Broadcasting Standards Authority (BSA) was established under the Broadcasting Act 1989. The Act imposes a duty on all broadcasters to maintain a range of standards. The three key functions of the BSA include:

- Complaints determination
- Oversight and development of the broadcasting standards system
- Education and engagement.

To help maintain broadcasting standards, the BSA relies on the public making complaints. Therefore, public awareness of the BSA and the complaints process is a key aspect of the effective regulation of broadcasting.

This survey has been commissioned to understand the current levels of awareness of the BSA and the complaints process. More specifically, the objectives of the research were to measure:

- The percentage of New Zealanders who are aware of the BSA;
- The percentage of New Zealanders who are aware they can make a formal complaint about breaches of broadcasting standards; and
- The percentage of Māori, Asian and Pasifika who are aware of these matters.

As in 2017 and 2019, the BSA was also interested to understand more about the public's level of awareness around the availability and use of filtering technology (parental locks) on free-to-air television, pay television, and other content platforms. Additional questions on this topic were included in the survey questionnaire.

The questions in the 2021 and 2019 survey are a repeat of those asked in 2017, but with an additional question added asking respondents to describe, in as much detail as they can, how you can restrict or block access to content on television.

Some of the questions used in the past three surveys (2021, 2019 and 2017) were previously used in the 2014 Omnibus survey (conducted by AC Nielsen), albeit with slight differences in the wording.

Awareness and knowledge of the BSA and the complaints process

1.1 Awareness of the complaints process

Overall, 93% of New Zealanders say they know for sure or assume they can make a formal complaint if they are concerned about content of a programme on radio or television (know for sure 68% + assume you can 25%). In 2019 it was 97%.

However, there has been a significant decrease in the proportion of respondents who **know for sure they can make a formal complaint**; down 16%, from 84% in 2019 to 68% in 2021.

At the same time, the proportion of New Zealanders who **assume they can make a formal complaint** has risen by 12%; from 13% in 2019 to 25% in 2021.

Demographic differences are summarised below:

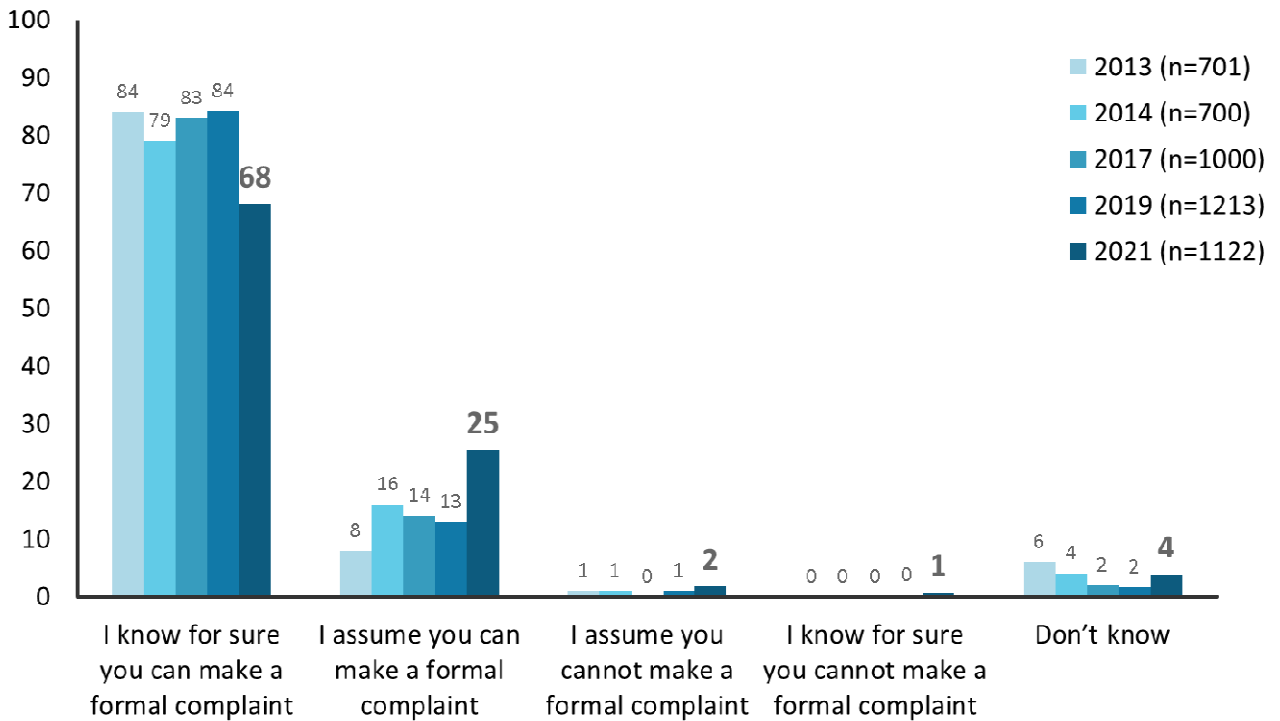
- Older respondents aged 60+ (82%), NZ European respondents (75%), those who were not working (74%), and freehold homeowners (78%) were **more likely to know for sure they could make a formal complaint**.
- Auckland residents (62%), respondents aged 18-29 (48%) and Asian respondents (44%) were **less likely to know for sure they could make a formal complaint**.

Awareness of complaints process tracked against previous two surveys -

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?

Base: All respondents

**question asked in 2014 was slightly different from that asked in 2017 and 2019 (see page 8)*



1.2 Knowledge of the complaints process

The table overleaf summarises responses to the following question from all respondents.

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.

Overall, 84% of respondents were aware they can take a course of action that would lead them to finding out about how to make a formal complaint. This is similar to 2014 (85%), but 11% fewer than 2017 (95%) and 7% fewer than 2019 (91%).

Twenty nine percent of respondents mentioned the BSA (or some variation) in their response; consistent with 2014 (31%), but 12% fewer than 2017 (41%) and 11% fewer than 2019 (40%).

Respondents aged 18-29 (17%) and Asian respondents (15%) were less likely to mention the BSA, while NZ European respondents (35%) were more likely.

Twenty-five percent of Asian respondents said they did not know what to do, which is 9% more than the overall population (16%).

In summary, the 2021 results suggest the BSA has reduced name recognition compared with the previous surveys in 2019 and 2017, and that reliance on internet and technology to find more information has stabilised.

While 16% of respondents claim they do not know how to go about making a complaint, given 93% of respondents in 2021 know or assume there is a complaints process, we can assume that most of those 16% could find out about the complaints process if they chose to.

Knowledge of complaints process tracked against previous two surveys

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.

	2021 (%)	2019 (%)	2017 (%)
<i>Base</i>	1122	1213	970
Contact BSA or similar (NET)	29	40	41
• Contact/complain to Broadcasting/Complain/Authority/Body/Board/Committee	6	9	15
• Contact/complain to BSA/Broadcasting Standards Authority/Association	15	18	13
• Write/email/fax to complain to BSA/Broadcasting Standards Authority/Association	6	9	11
• Contact/complain to Broadcasting commission/Broadcasting Standards commission	1	2	2
• Phone to complain to BSA/Broadcasting Standards Authority/Association	0	0	0
• Contact/complain to Broadcasting (Complaints) Tribunal	1	1	1
Contact Broadcaster (NET)	18	17	16
• Write/email/fax to complain to broadcaster/TV/radio channel/Station concerned (incl. Sky)	8	8	5
• Contact/complain to broadcaster/TV/radio channel/station concerned	9	8	11
• Phone to complain to broadcaster/TV/radio/station concerned	1	1	1
Contact both Broadcaster & BSA (NET)	1	0	0
Contact the broadcaster first/if not happy contact BSA (NET)	2	4	1
Other methods of complaining (NET)	28	35	32
• Would check details/information on internet/website (incl. NZ on Air, BSA, TVNZ, TV3)	22	27	24
• Write/email/fax the appropriate body/ombudsmen	4	5	4
• Complaint can be made online/through website	2	3	3
• Phone the appropriate body/ombudsman	0	0	0
• Contact the appropriate body/ombudsmen	0	1	1
• Advertising Standards Authority/ASA	1	1	1
• Fill out complaints form	1	1	0
Other aspects (NET)	42	50	39
• Provide relevant programme/programme details/why offensive/which standards breached	17	30	24
• Provide details time/date/channel	18	29	22
• Ads/information advertised regularly on TV/radio	10	10	11
• Need to make complaint within a certain timeframe/specified time	6	8	6
• Complaint is reviewed and answered/sent receipt of complaint	2	4	0
• Provide your details	1	1	0
• Need to make complaint within 20 days	3	4	0
• Other	5	2	2
Don't know/don't know any other details	16	9	5

Note: Multiple response

Base: All respondents (2019 and 2021) / respondents who were aware of the complaint procedure (2017)

1.3 Awareness of the BSA

A majority of New Zealanders surveyed claimed they were aware of the BSA (75%). This is a significant 14% decrease compared with 2019, when 89% said they were aware. This is also lower than those who said they were aware in 2017 (92%) and 2014 (81%).

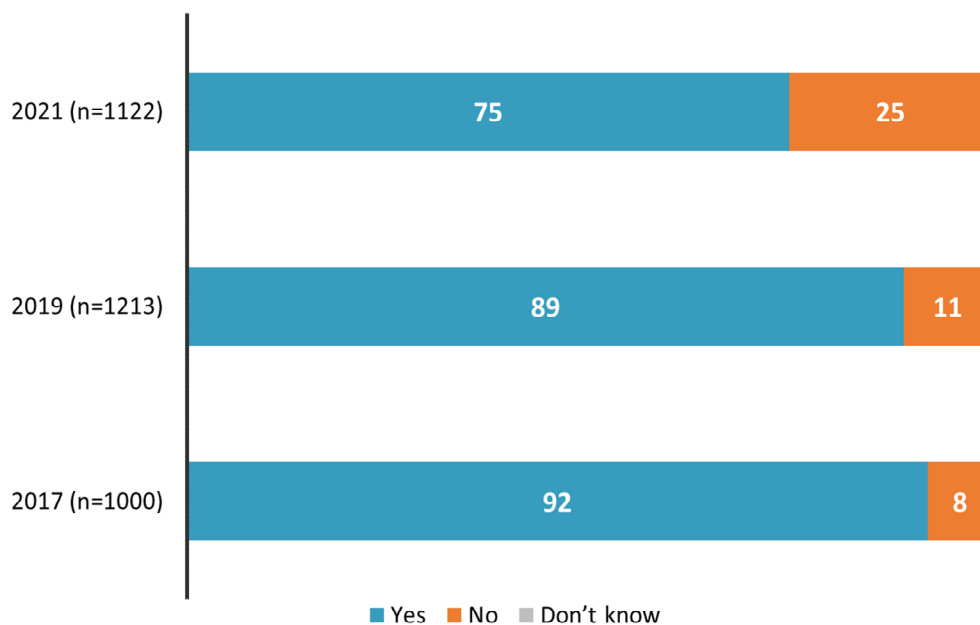
Pasifika (57%) and Asian (40%) participants were significantly less likely to be aware of the BSA, compared with non-Maori/Pasifika/Asian respondents (87%).

Demographic differences at an overall level are as follows:

- Respondents aged 60 or over (91%) and freehold homeowners (87%) were **more likely to be aware of the BSA**.
- Auckland residents (68%), respondents aged 18-29 (54%) and renters (70%) were **less likely to be aware of the BSA**.

Awareness of BSA tracked against previous two surveys

Are you aware of the Broadcasting Standards Authority (BSA)?



Base: All respondents

1.4 Knowledge of BSA's role

Most of those who are aware of the BSA have a general understanding of the BSA's role:

- 23% identify their role in taking complaints (being the place to complain to); 10% fewer than 2019.
- 19% say the BSA reviews and investigates complaints; similar to 2019.
- 14% say that the BSA sets and manages the broadcasting standards, a significant decrease compared to those who said this in 2019 (32%) and 2017 (36%); and,
- 32% say the BSA 'monitors/regulates content on radio and television/it acts as a watchdog; 6% more than 2019.

Only fifteen percent did not know anything about the BSA. However, this was a 7% increase compared with 2019 (8%) and 14% compared with 2017 (1%).

Knowledge

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

	2021	2019	2017 (%)
Base: n=	839	1080	918
Monitors/Watchdog/regulates contents/television content	32	26	18
Handles/takes in complaints/place to complain to	23	33	30
Review/follow up/investigates complaints	19	21	24
Sets/manages standards/content/broadcasting	14	32	36
Control ratings/censorships	14	10	9
It's a regulatory board	3	1	4
Government agency	1	1	5
Know a little	1	1	2
Other	3	3	1
None/Don't know/nothing	15	8	1

Base: Asked of those who are aware of BSA

Note: Multiple response

Filtering Technology

2.1 Awareness of content restriction/blocking on television

As in 2017 and 2019, the BSA was interested to understand more about the public's level of awareness around the availability and use of filtering technology (parental locks) on free-to-air television, pay television, and other content platforms.

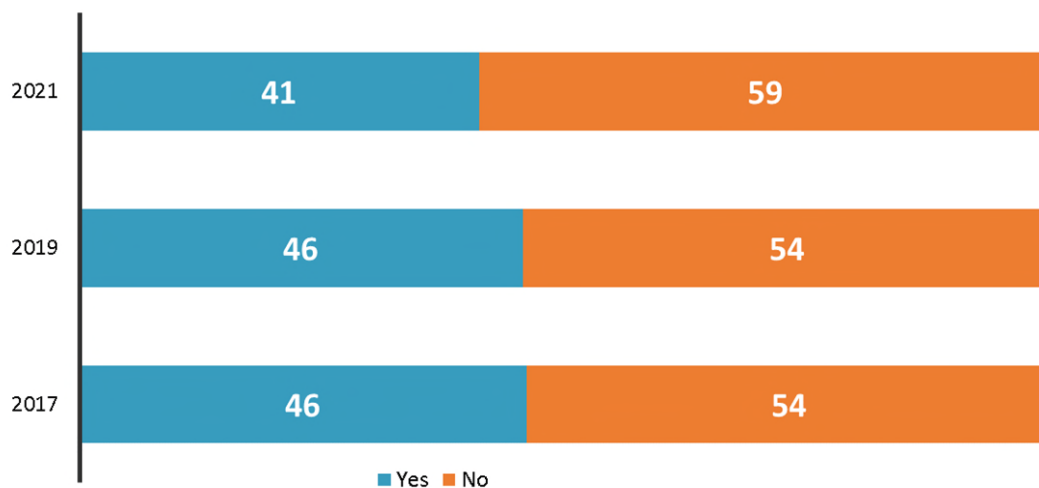
Awareness of filtering technology or the ability to restrict or block content on television reduced compared with 2017 and 2019. 41% of respondents said they were aware, compared with 46% in both previous surveys.

Demographic differences at an overall level are as follows:

- Rural respondents (51%), males (47%) and NZ Māori respondents (54%) were **more likely to say they were aware** of ways in which you can block access to content on television.
- Females (36%), respondents aged 60+ (35%) and Asian respondents (30%) were **less likely to say they were aware** of ways to block access to content on television.

Declared awareness

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



Base: All respondents (n=1122)

2.2 Knowledge of content restriction/blocking process

As in 2019, this survey included a question to understand in more detail what viewers knew about the actual process of restricting or blocking content generally.

Forty five percent of respondents mentioned using built-in functionality of the service or app, for example parental control settings, on Sky, Netflix, You Tube etc; 5% fewer than in 2019. A much lower proportion (12%) mentioned using an in-built feature on their TV or device; similar to the 10% who said this in 2019.

Adding a pin or password to certain content was mentioned by 15% of respondents, 19% fewer than who said this in 2019.

Other methods of filtering identified were:

- 12% were aware they could set age restrictions and / or block R rated content; similar to 2019 (13%).
- 8% were aware they could set filters / profiles where only certain content is shown e.g. 'kid's mode'; similar to 2019 (7%).
- 5% were using blocking features on internet / within browser settings, the same as 2019.

The following demographic differences were noted:

- Respondents with dependent children were more likely to say they were 'unsure' (24%) than those without dependent children (8%). Those without children were also more likely to say they would use Google (8% vs. 2% with dependent children).
- Respondents aged 60+ were more likely to switch the tv off (18% versus 7% overall) or do a Google search (19% versus 6% overall).

Knowledge

Please describe, in as much detail as you can, how you can restrict or block access to content on television. Please be as detailed as you can including the process you follow for blocking or restricting content and which media you are referring to?

	2021	2019
Base: n=	461	552
Using built-in functionality of service/app e.g. parental control settings in Sky, Netflix, YouTube etc	45	50
Adding a pin/ password to certain content	15	34
Setting age restrictions/ blocking R rated content	12	13
Using in-built feature on TV/ device	12	10
Setting filters/ profiles where only certain content is shown e.g. 'kids' mode'	8	7
Switch it off/ don't watch	7	11
Would use google/research to find out if required	6	3
Using blocking features on internet/ within browser settings	5	5
Using settings through ISP/ home network/ router	1	1
Using third-party software or apps	0	2
Other	6	2
Unsure/ nothing specified	14	13

Base: Asked of those who are aware of ways to restrict or block access to content on television (n=461)

Note: Multiple response

2.3 Knowledge of filtering technology on different platforms

All respondents were asked if they had any knowledge of filtering technology across five different media platforms; Pay television, Web Browsers generally, Subscription video on demand, YouTube and Free-to-air television.

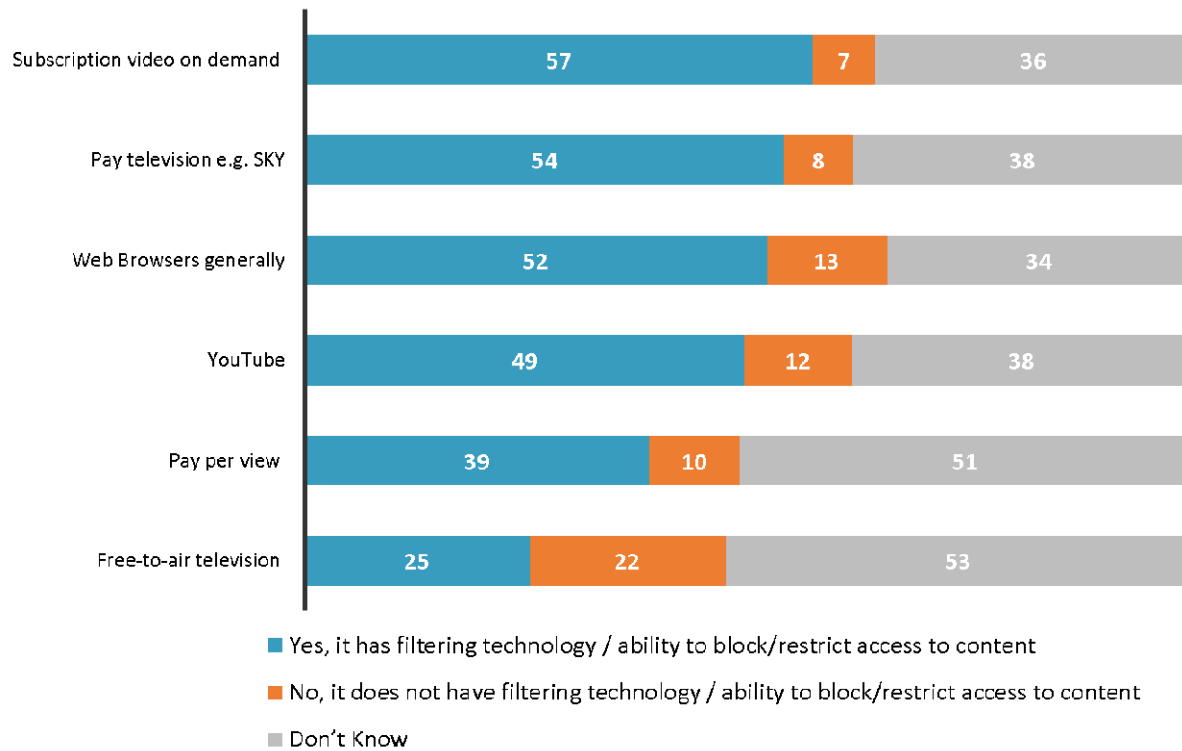
- Over half (54%) knew that filtering technology was present on pay television; 11% fewer than in 2019 and 2021 (65% apiece).
- Fifty-two percent knew filtering technology was present on Web browsers generally; a 5% decrease compared with 2019 (57%) and 11% fewer than 2017 (63%).
- Over half of the respondents had knowledge of filtering technology on subscription video (57%). This was a 5% increase compared with 2019 (52%) and an 11% increase compared with 2017 when 46% were aware.
- Forty-nine percent said they were aware of filtering technology on YouTube; a marginal 3% decrease from 2019 (52%) and a marginal 3% increase (46%) compared with 2017.
- Thirty-nine percent said they were aware of filtering technology on Pay per view. (NB – this was not asked in 2019).
- A quarter (25%) said that they knew of filtering technology on free-to-air television, a 7% increase from 2019 and a 9% increase from 2017.

Generally, younger respondents (18-44), Māori respondents, respondents with dependent children and in paid work, were **more likely to be aware** of filtering technology across the various platforms, while older respondents (60+), those without dependent children and those not working or earning less than \$50k were **less likely to be aware**.

Demographic differences by platform are set out in the Appendix.

Knowledge of filtering technology

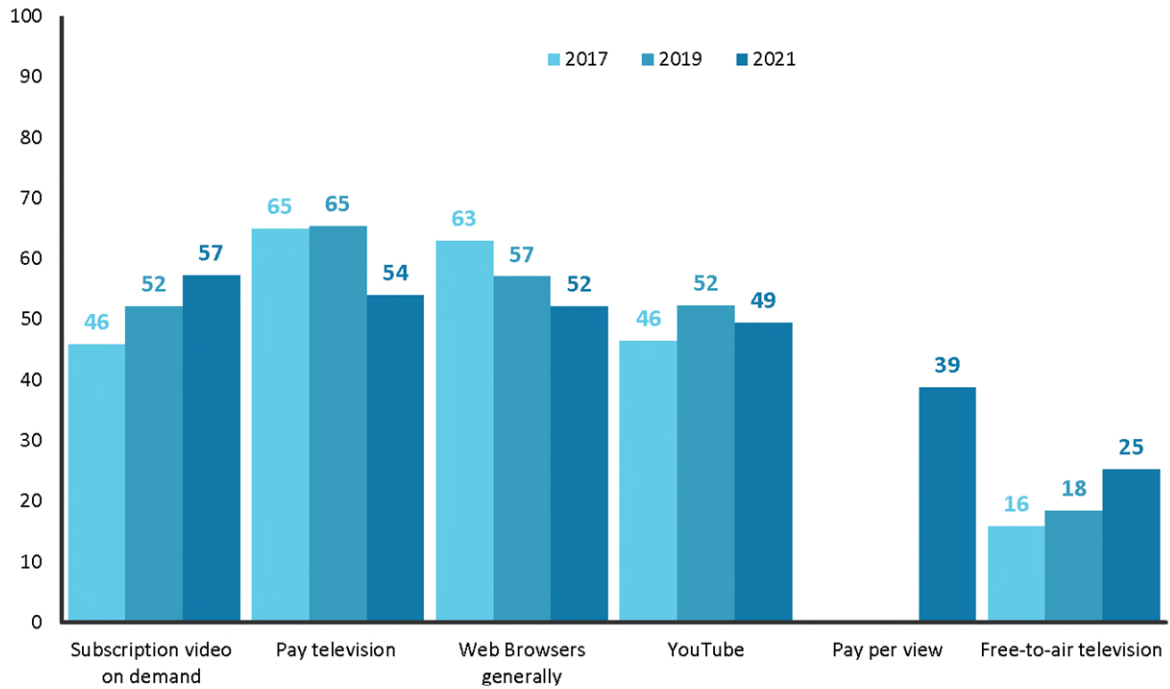
Filtering technology/parental control/rating locks are features that allow you to block, or restrict access to, certain media content. Please select which of the following you think have filtering or blocking technology capability.



Base: All respondents (n=1122)

Knowledge of filtering technology – tracking –

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.



Base: All respondents

2.4 Use of filtering technology

Respondents who were aware of filtering or blocking technology capability were asked to indicate if they knew how to use / set up filtering / blocking technology and if they personally used blocking or filtering technology on the media platforms they were aware had this capability; Pay television, Web Browsers generally, YouTube, Subscription video on demand and Free-to-air television:

- Thirty-two percent of respondents claimed they knew how to use filtering technology on **Pay television**, an 8% decrease compared with 2019 (40%) and a 10% decrease compared with 2017 (42%).
- Thirty-four percent said they knew how to use filtering technology on **Web Browsers** generally, similar to 2019 (37%), but 8% less than 2017 (42%).
- Thirty-five percent said they knew how to use filtering technology on **subscription video on demand**, similar to 2019 (34%) and 7% more than those who said this in 2017 (28%).
- Thirty-four percent said they knew how to use filtering technology on **YouTube**, similar to 2019 (33%) and 2017 (32%).
- Sixteen percent said they knew how to use filtering technology on **Free to Air Television**, 5% more than in 2019 (11%) and 6% more than 2017 (10%).
- Twenty one percent said they knew how to use filtering technology on **pay per view** (This question was first asked in 2021).

Only a small minority of New Zealanders said they personally use filtering or blocking technology, ranging from 7% who said they use it on Free-to-air television to 15% who use it on Web Browsers generally and Pay television. 16% apiece use it on YouTube and Subscription video on demand and 9% on pay per view.

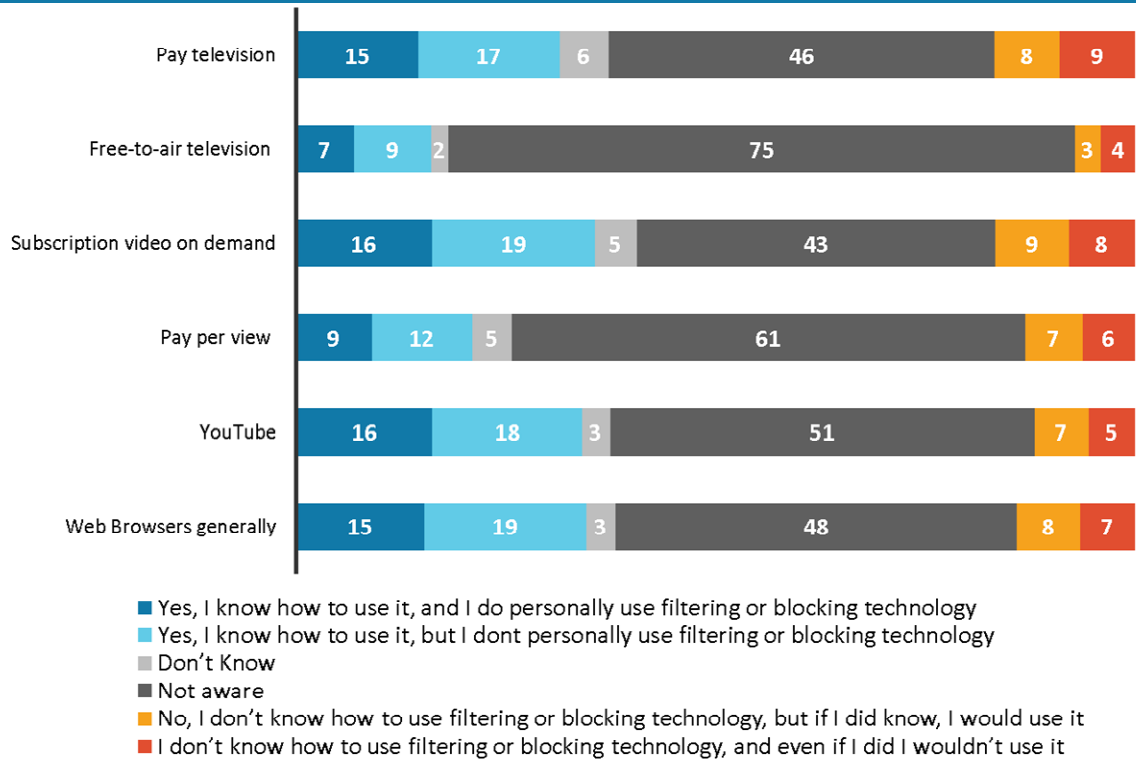
Personal usage has remained relatively stable since 2019, with 15% apiece using filtering technology for Pay Television and Web Browsers generally (the same as 2019), 16% apiece for subscription video on demand and Web Browsers generally (14% apiece in 2019) and 7% for Free-to-air television; a marginal 3% increase compared with 2019 (4%). 9% are using filtering technology on pay per view.

Similar to knowledge of filtering technology, younger respondents (18-44), Māori and those with dependent children are generally **more likely to know how to set up and personally use filtering / blocking technology**. Older (60+) respondents and those without dependent children are **less likely to know**.

Demographic differences by platform are set out in the Appendix.

Usage

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? –



Base: Respondents who were aware of filtering /blocking technology on that platform

Pay television n=606

Free-to-air television n=281

Subscription Video on demand n=640

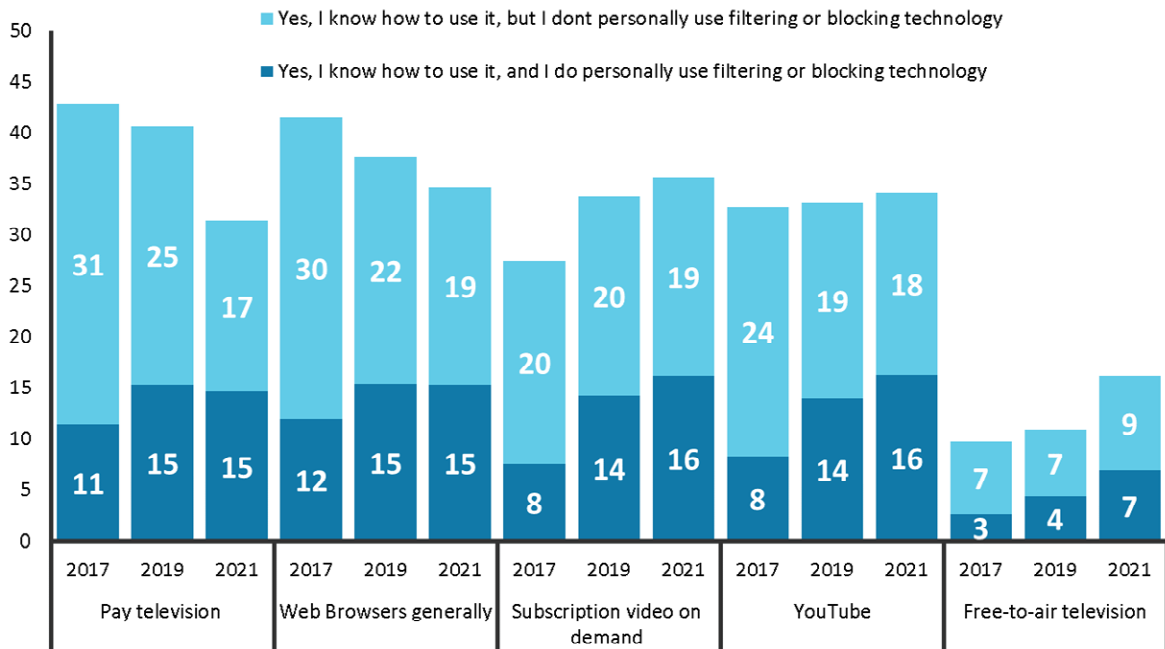
Pay per view n=438

You Tube n=550

Web Browsers generally n=583

Usage – tracking –

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?



Base: Respondents who were aware of filtering /blocking technology on that platform

2017	2019	2021
Pay television n=650	Pay television n=788	Pay television n=606
Free-to-air television n=160	Free-to-air television n=218	Free-to-air television n=281
Subscription Video on demand n=460	Subscription Video on demand n=631	Subscription Video on demand n=640
Pay per view - NA	Pay per view - NA	Pay per view n=438
You Tube n=460	You Tube n=631	You Tube n=550
Web Browsers generally n=630	Web Browsers generally n=691	Web Browsers generally n=583
Pay television n=650	Pay television n=788	Pay television n=606

Appendix

3.1 Knowledge of Filtering Technology – demographic differences by platform

Pay television (54% aware overall):

- Respondents aged 18-29 (64%), Māori (63%), non-Māori/Pasifika/Asian respondents (57%), working 30+ hours per week (61%), renting (60%) and with a household income of more than \$100k per year (62%) were **more likely to be aware** of filtering / blocking technology.
- Respondents aged 60+ (41%), respondents not working (49%) and those with a freehold home (47%) were **less likely to be aware**.

Web Browsers generally (52% aware overall):

- Respondents aged 18-59 (65%) and 30-44 (62%), Māori (61%), those with dependent children (63%), in paid employment (59%), renting (58%) and with household incomes above 100k (64%) were **more likely to be aware**.
- Respondents aged 60+ (34%), those with no dependent children (47%), those not working (43%), with freehold homes (41%) and with household incomes less than \$50k (46%) were **less likely to be aware**.

Subscription video on demand (57% aware overall):

- Respondents aged 18-29 (70%) and 30-44 (69%), Asian respondents (67%), those with dependent children (67%), those in paid employment (66%), those with household incomes over \$100k (67%) and renters (65%) were **more likely to be aware**.
- Respondents aged 60+ (35%), those with no dependent children (52%), those not working (50%) and living in freehold homes (43%) were **less likely to be aware**.

YouTube (49% aware overall):

- Respondents aged under 18-29 (73%) and 30-44 (63%), Māori (58%), Asian respondents (64%), those with dependent children (61%), those in paid work (57%), renting (58%) and with household incomes above 100k (57%) were **more likely to be aware**.
- Respondents aged 45-59 (42%), 60+ (25%), those without dependent children (44%), those not working (42%), with household incomes less than \$50k (34%) and freehold homeowners (34%) were **less likely to be aware**.

Free-to-air television (25% aware overall):

- Males (29%), Māori (35%) and renters (29%) were **more likely to be aware**.
- Females (21%) were **less likely to be aware**.

Pay per view (39% aware overall):

Auckland residents (44%), males (44%), respondents aged 30-44 (46%), working 30+ hours per week (47%) and renters (44%) **were more likely to be aware**.

Those living in the provinces (34%), females (34%), aged 60+ (26%), working less than 30 hours per week (30%) and living in freehold homes (29%) **were less likely to be aware**.

3.2 Use of Filtering Technology – demographic differences by platform

Pay television (15% overall know how to use and personally use):

- Rural respondents (25%), males (19%), aged 30-44 (23%), Māori (23%), those with dependent children (24%), working more than 30 hours per week (20%) and renters (19%) were **more likely to know how to set up and to personally use filtering/ blocking technology**.
- Females (11%) older (60+) respondents (6%), those without dependent children (10%), non-workers (10%) and freehold homeowners (9%) were **less likely to know**.

Web Browsers generally (15% overall know how to use and personally use):

- Respondents aged 30-44 (23%), Māori (23%), those with dependent children (25%), working 30+ hours (19%) and renting (22%) were **more likely to know how to set up and to personally use filtering / blocking technology**.
- Respondents aged 60+ (7%), NZ European respondents (13%), respondents without dependent children (10%) and freehold homeowners (8%) were **less likely to know**.

Subscription video on demand (16% overall know how to use and personally use):

- Respondents aged 18-29 (23%), 30-44 (27%), Māori (24%), with dependent children (28%), renting (22%) and working 30+ hours per week (21%) were **more likely to know how to set up and to personally use filtering / blocking technology**.
- Respondents aged 60+ (5%), NZ European respondents (13%), without dependent children (10%), non-working (12%) and with freehold homes (6%) were **less likely to know**.

YouTube (16% overall know how to use and personally use):

- Rural respondents (24%) aged 30-44 (27%), Māori (24%), with dependent children (29%) and renting (23%) were **more likely to know how to set up and to personally use filtering / blocking technology**.
- Respondents aged 60+ (5%), Non-Māori/Pasifika/Asian respondents (14%), without dependent children (10%) and with freehold homes (7%) were **less likely to know**.

Free-to-air television (7% overall know how to use and personally use):

- Rural respondents (14%), males (9%), Māori (13%), renting (10%) and those with dependent children (11%) were **more likely to know how to set up and to personally use filtering / blocking technology**.
- Females (5%), respondents aged 60+ (3%) and without dependent children (5%) were **less likely to know**.

Pay per view (9% overall know how to use and personally use):

- Rural respondents (17%), males (12%) aged 30-44 (15%), with dependent children (15%) and working 30+ hours per week were **more likely to know how to set up and to personally use filtering / blocking technology**.
- Females (6%), respondents aged 60+ (3%) and without dependent children (6%) were **less likely to know**.