

Public Awareness Online Omnibus Research – Final Report

Broadcasting Standards Authority

June 2017



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Executive Summary

The Broadcasting Standards Authority's (BSA) Statement of Intent 2014-18 contains as a measure that: public awareness that individuals can make a formal complaint about television and radio content is increased to, and maintained at, over 90%. In its Statement of Performance Expectations the BSA undertakes to commission every two years a survey measuring the percentage of New Zealanders aware of the BSA, aware that they can make a formal complaint, and able to identify a course of action which would lead them to find out about the correct process for making a formal complaint, and to analyse the results against the benchmark set in the 2010 public awareness survey. Accordingly this report analyses the results of the 2017 survey against the previous survey in conducted 2014, as well as the benchmark 2010 survey.

Awareness of the BSA

92% of New Zealanders are aware of the BSA – an 11% increase compared with 2014.

Awareness of the complaints process

95% of New Zealanders are aware they can take a course of action to find out how to make a formal complaint, while 83% are aware they can make a formal complaint – representing a 10% and 4% increase respectively, compared with 2014. When compared to 2010, the proportion of New Zealanders who are aware they can take a course of action to make a formal complaint remained relatively similar. However, compared with 2010, there was small decline in the proportion of respondents who are aware they can make a formal complaint (down 5%).

Older respondents and those who own a home are more likely to be aware how to 'make a formal complaint' and to be 'aware of the BSA'.

SOI/SPE measures

Overall, the 2017 results are an improvement when compared with 2014, with increases in awareness across all three measures. When compared to the 2010 benchmark survey, there has been a 5% decrease in the number of people who are aware they can make a formal complaint. Awareness of the BSA and awareness they can take a course of action that would lead them to find out about how to make a formal complaint have remained relatively consistent.

SOI/SPE measures tracked

	2010 (%)	2013 (%)	2014 (%)	2017 (%)
Aware can make a formal complaint	88	84	79	83
Aware could take a course of action that would lead them to finding out about how to make a formal complaint	96	92	85	95
Awareness of BSA	95	85	81	92

Awareness and knowledge of the BSA's role

Most of those who are aware of the BSA have a good understanding of the BSA's role, with 54% identifying the BSA's role in the development of broadcasting standards and dealing with complaints.

Awareness, knowledge and usage of filtering technology/parental locks

Unprompted, less than half of New Zealanders (46%) are aware of the availability of filtering technology.

When asked about knowledge of filtering technology across five different platforms, a majority of respondents were aware of filtering technology on pay television (65%) and web browsers (63%). Around half of the respondents (46%) were aware of filtering technology on YouTube and subscription video on demand, while only 16% said that they knew of filtering technology on free-to-air television.

Those with dependent children were generally more likely to know about filtering technology across the platforms than those without dependent children. Greatest knowledge in filtering technology was recorded for web browsers with three quarters (75%) of those with dependent children declaring knowledge, compared to 57% of those without dependent children.

For free-to-air television there was no significant difference in knowledge of filtering technology between those with dependent children (13%) and those without dependent children (17%). Almost three quarters (71%) of those with dependent children declared knowledge of the presence of filtering technology on pay television compared to 62% of those without dependent children.

Depending on the platforms tested, between 3% and 12% of New Zealanders know how to use filtering technology and personally use it. However, many New Zealanders are not aware of filtering technology on the platforms listed in the survey. Lack of awareness was highest for free-to-air television with 84% being unaware of the availability of filtering technology. This was followed by subscription video on demand (58% unaware), YouTube (54% unaware), web browsers generally (37% unaware), and pay television (35% unaware).

Generally, under 30s and those with higher household income (over \$100k) are more likely to know how to use filtering technology and to personally use it.

Those with dependent children are also more likely to know how to use filtering technology and personally use filtering technology across 4 out of 5 tested platforms compared to those without dependent children:

- Web browsers (21% compared to 8%)
- Pay television (21% compared to 7%)
- YouTube (18% compared to 4%)
- Subscription video on demand (17% compared to 3%).

There was no difference in the personal usage of filtering technology amongst those with dependent children (4%) and those without dependent children (2%), on free-to-air television.

Methodology

Results in this report are based upon questions asked in the UMR Research nation-wide online omnibus survey. This is an online survey of a nationally representative sample of 1,000 New Zealanders aged 18 years and over.

Fieldwork for this survey was conducted from 28 April to 10 May 2017.

The margin of error for a 50% figure at the 95% confidence level for a sample of n=1,000 is approximately $\pm 3.1\%$.

Reporting Notes

1. Wording of tracked questions differs slightly in the 2017 survey to that used in the 2010, 2013 and 2014 surveys. 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 2010, 2013 and 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*)

Awareness of the BSA

- Before today, have you heard of an organisation called the Broadcasting Standards Authority? (*asked in 2010, 2013 and 2014*)
- Are you aware of the Broadcasting Standards Authority (BSA)? (*asked in 2017*)

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

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 standards, including the maintenance of law and order, the privacy of individuals, the protection of children, the requirement for broadcasts to be factually accurate, fair and balanced, and safeguarding against programmes which encourage denigration or discrimination.

The three key functions of the BSA include:

- Complaints determination
- Oversight and development of the broadcasting standards system
- Information and communication.

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

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; and
- The percentage of New Zealanders who are aware they can make a formal complaint about breaches of broadcasting standards.

Some of the questions used in the survey were previously used in the 2010, 2013 and 2014 Omnibus surveys (conducted by AC Nielsen), albeit with slight differences in the wording of the questions (as mentioned on the previous page).

In this year's survey, the BSA was also interested to understand more about the level of awareness by the public about 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.

Awareness and knowledge of the BSA and the complaints process

1.1 Awareness of the complaints process

Overall, 97% of New Zealanders say they are aware or assume they can make a formal complaint if they are concerned about content of a programme on radio or television ('know for sure' combined with 'assume you can').

The proportion of respondents who 'know for sure they can make a formal complaint' has increased 4% in this survey to 83%, compared with 79% in 2014.

There was an insignificant decrease in the proportion of respondents who 'assumed they can make a formal complaint' (down 2%, to 14%).

Older respondents were more likely to 'know for sure' they can make a formal complaint (91% among those aged 45-59 and 88% among those 60+) than younger respondents (an average of 76% among those younger than 44).

Respondents living in the Wellington or Wairarapa regions were more likely to be 'sure' they can make a formal complaint (87%), compared to those living in the Auckland, Christchurch, or Timaru regions (81% apiece).

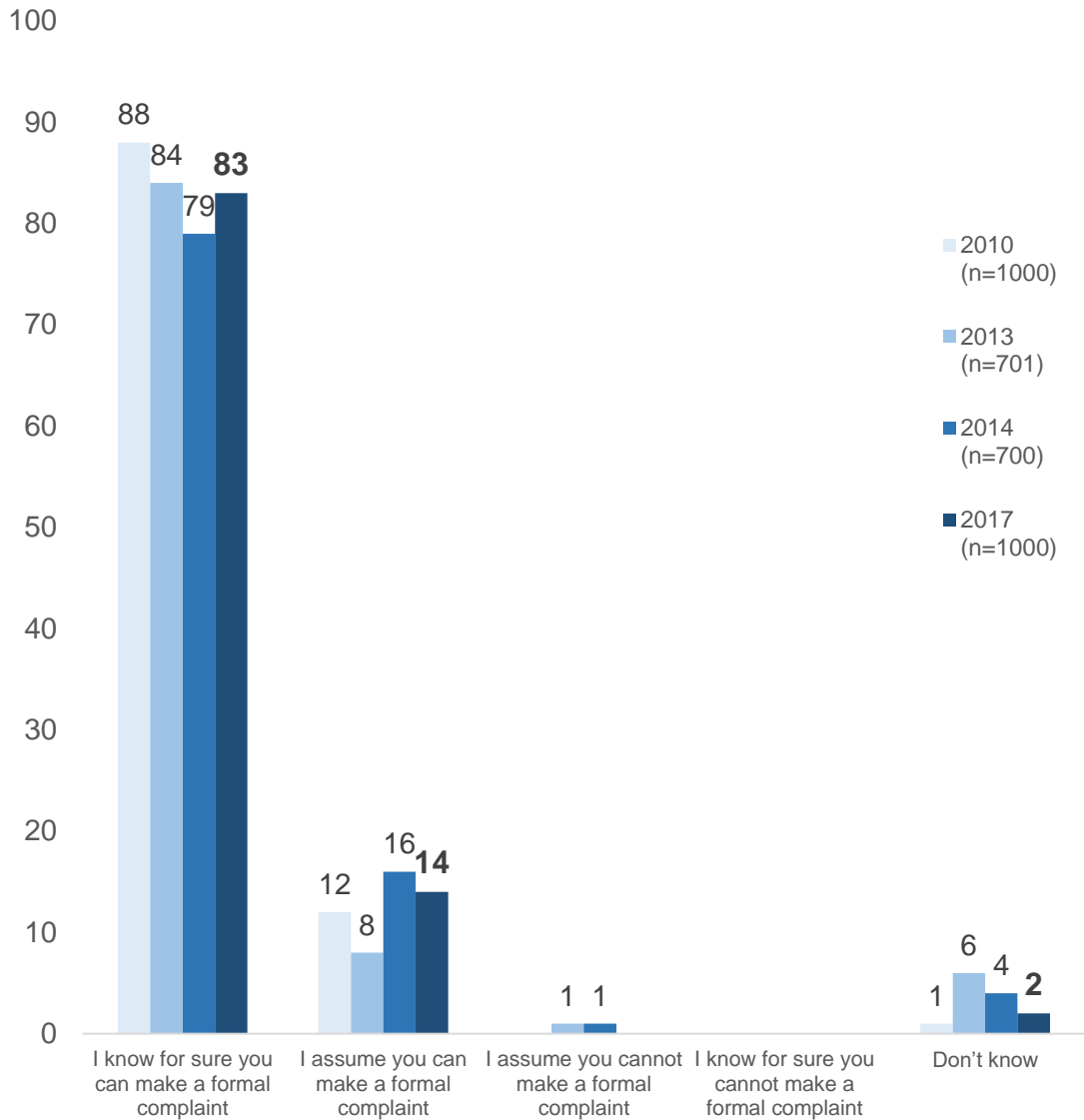
Asian respondents were significantly less likely to declare they 'know for sure' you can make a formal complaint (66%), as were Pacific Islanders (68%).

Awareness of complaints process tracked against previous two surveys and 2010 benchmark

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 2010, 2013 and 2014 was slightly different from that asked in 2017 (see page 5)*



1.2 Knowledge of the complaints process

The table overleaf summarises responses to the following question among those respondents who 'knew for sure' or who 'assumed' you can make a formal complaint.

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.

Over two fifths (41%) of respondents mentioned the BSA (or some variation) in their response; a significant 10% increase compared with 2014, a negligible 3% increase compared with 2013 and a significant drop (15%) compared to 2010. These included responses such as 'Broadcasting Authority' or 'Broadcasting Commission'.

The proportion of respondents who mentioned 'contacting the broadcaster' was comparable with 2014 (16% compared with 15% in 2014). The same proportion of respondents mentioned this in 2010.

A smaller proportion of respondents in 2017 (39%) mentioned 'other aspects' of the process than in 2014 (42%) and 2013 (47%). However, the proportion of respondents who specifically mentioned relevant programme details, why it's offensive, time, and date remained relatively steady when compared to previous years.

Reliance on the internet has gained traction in 2017. 24% of respondents mentioned they would check details on the internet; a 6% increase from 2014, a 14% increase from 2013, and a 4% increase from 2010.

In 2017, only 5% of respondents said they didn't know what do to when making a complaint. This is lower than 2014 (15%) and 2013 (9%), and consistent with 2010 (4%).

In summary, the 2017 results showed that the BSA has greater name recognition compared with the previous survey in 2014, and there is a greater reliance on the internet and technology to find more information. Similar proportions (compared to 2013 and 2014) are aware of what information needs to be provided when lodging a complaint. Even though the complaint procedure mentioned may not necessarily be the correct procedure, the low proportion of respondents (5%) who said 'don't know' suggests there is greater knowledge of the actions necessary to lodge a formal complaint.

Knowledge of complaints process tracked against previous two surveys and 2010 benchmark

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.

	2010 (%)	2013 (%)	2014 (%)	2017 (%)
<i>Base</i>	1,000	662	666	970
Contact BSA or similar (NET)	56	38	31	41
Contact/complain to Broadcasting/Complain/Authority/Body/Board/Committee	-	7	11	15
Contact/complain to BSA/Broadcasting Standards Authority/Association	29	18	9	13
Write/email/fax to complain to BSA/Broadcasting Standards Authority/Association	26	9	6	11
Contact/complain to Broadcasting commission/Broadcasting Standards commission	-	2	3	2
Phone to complain to BSA/Broadcasting Standards Authority/Association	3	1	1	0
Contact/complain to Broadcasting (Complaints) Tribunal	-	2	1	1
Contact Broadcaster (NET)	16	20	15	16
Write/email/fax to complain to broadcaster/TV/radio channel/Station concerned (incl. Sky)	8	9	9	5
Contact/complain to broadcaster/TV/radio channel/station concerned	7	10	4	11
Phone to complain to broadcaster/TV/radio/station concerned	2	2	2	1
Contact both Broadcaster & BSA (NET)	3	0	2	0
Contact the broadcaster first/if not happy contact BSA (NET)	3	1	1	1
Other methods of complaining (NET)	-	25	39	32
Would check details/information on internet/website (incl. NZ on Air, BSA, TVNZ, TV3)	20	10	18	24
Write/email/fax the appropriate body/ombudsmen	4	9	17	4
Complaint can be made online/through website	2	4	8	3
Phone the appropriate body/ombudsmen	1	2	3	0
Contact the appropriate body/ombudsmen	1	1	1	1
Advertising Standards Authority/ASA	-	1	1	1
Fill out complaints form	1	1	1	0
Other aspects (NET)	-	47	42	39
Provide relevant programme/programme details/why offensive/which standards breached	24	26	24	24
Provide details time/date/channel	16	25	23	22
Ads/information advertised regularly on TV/radio	17	15	12	11
Need to make complaint within a certain timeframe/specified time	-	7	7	6
Complaint is reviewed and answered/sent receipt of complaint	10	3	3	0
Provide your details	2	1	3	0
Need to make complaint within 20 days	1	2	1	0
Other	6	4	8	2
Don't know/don't know any other details	4	9	15	5

Note: Multiple response

Base: Those who know for sure or assume you can make a formal complaint

1.3 Awareness of the BSA

A majority of New Zealanders surveyed claimed they were aware of the BSA (92%). This is an increase of 11% from 2014 – a significant and positive shift for the BSA.

Older respondents were more likely to be aware of the BSA. 97% of respondents aged 45 and over were aware compared with 77% of respondents aged between 18-29.

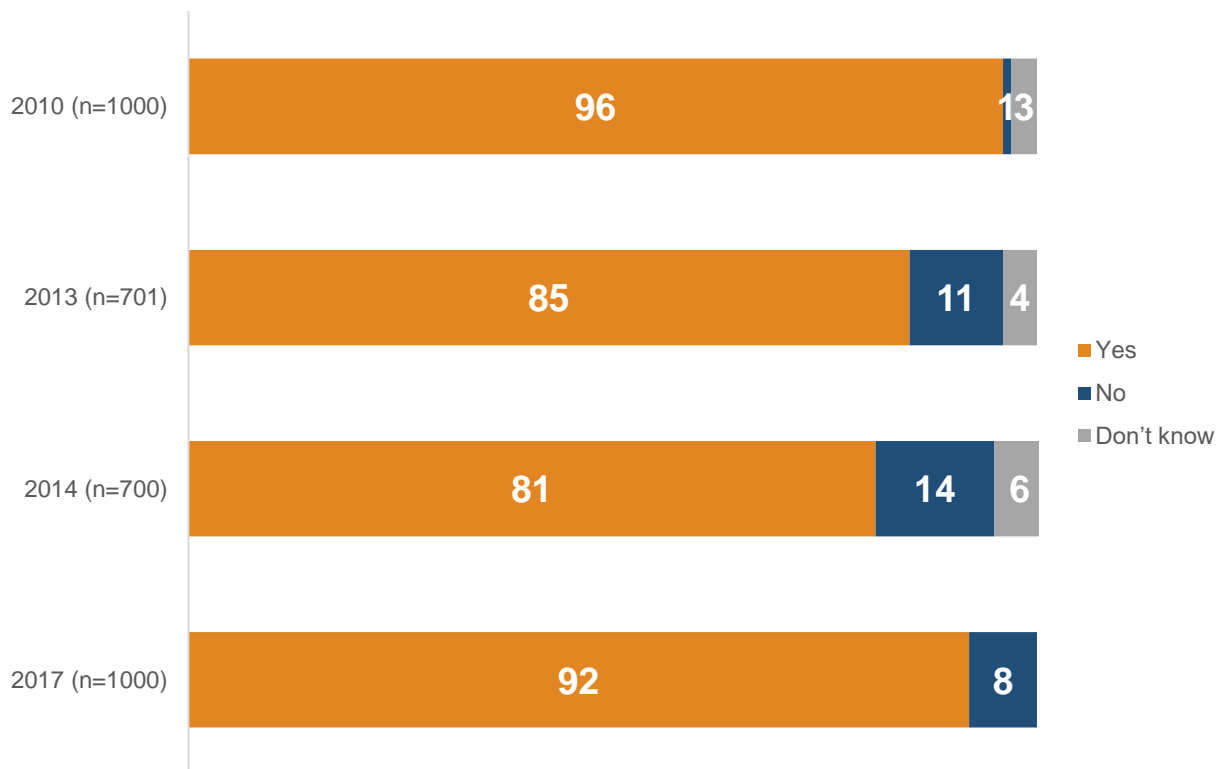
Individuals living in households with an income over \$100k were also more likely to be aware of the BSA (96%) than those living in household with an income less than \$50k (87%).

As with awareness of the complaints process, Asian and Pacific Island respondents were significantly less likely to be aware of the BSA (64% and 71% respectively) than other ethnicities.

Auckland residents were slightly less likely to be aware of the BSA (89%) compared to the other regions.

Awareness of BSA tracked against previous two surveys and 2010 benchmark

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



Base: All respondents

*question asked in 2013 and 2014 was slightly different from that asked in 2017 (see page 5)

1.4 Knowledge of the BSA's role

When respondents who were aware of the BSA were asked to describe the BSA's role and what the BSA does (a new question added to this year's survey), just under a third (30%) mentioned that the BSA 'handles/takes in complaints' or was the 'place to complain to' with regards to television standards. Almost a quarter (24%) mentioned they thought the BSA 'review/follow up/investigates complaints'. Combining these two findings, over half of the respondents (who were aware of the BSA) believe the BSA's role is related to dealing with complaints from the public (54%).

Over a third (36%) mentioned that the BSA 'sets/manages standards/content/broadcasting'. Younger respondents (18-29) were more likely to mention this as their understanding of BSA's role (43%). Just under two fifths (18%) mentioned the BSA 'monitors/regulates content on radio and television/it acts as a watchdog'. Combining these findings, 54% of New Zealanders identified the BSA's role in oversight and development of the broadcasting standards system.

Knowledge of the BSA's role

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?

	2017 (%)
<i>Base</i>	918
Sets/manages standards/content/broadcasting	36
Handles/takes in complaints/place to complain to	30
Review/follow up/investigates complaints	24
Monitors/Watchdog/regulates contents/television content	18
Control ratings/censorships	9
Government agency	5
It's a regulatory board	4
Know a little	2
Other	1
None/Don't know/nothing	1

Base: Asked of those who are aware of BSA (n=918)

Note: Multiple response

Filtering Technology

2.1 Awareness of content restriction/blocking on television

In this year's survey, the BSA was also interested to understand more about the level of awareness by the public about 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.

Awareness of filtering technology or the ability to restrict or block content on television was split; 46% of respondents were aware of filtering technology and 54% were not aware.

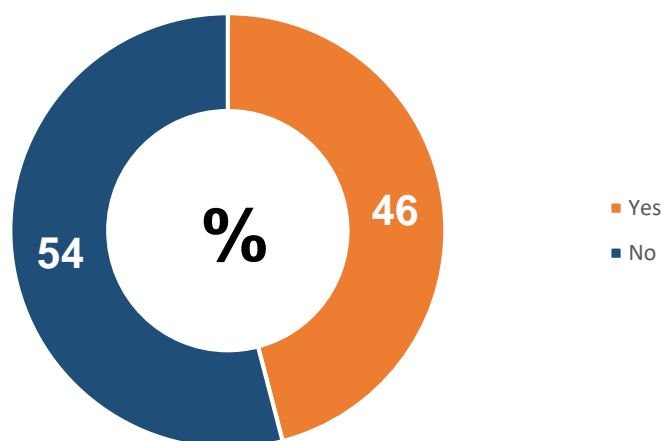
Those living in households with an overall income over \$100k were much more likely to be aware of filtering technology (54%), compared with 35% of those living in a household with an income of less than \$50k.

Older respondents (60+) were less likely to be aware of filtering technology (40%) than those who were younger (48%). There was also a difference in awareness among gender; 49% of males were aware of filtering technology compared with 43% of females.

There was no statistical difference in awareness of filtering technology between those with dependent children (45%) and those without (46%).

Awareness

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



Base: All respondents (n=1,000)

2.2 Knowledge of filtering technology

All respondents were asked if they had any knowledge of filtering technology across five different media/content platforms. Over three fifths knew that filtering technology was present on pay television (65%) and web browsers (63%). Nearly half of the respondents (46%) had knowledge of filtering technology on YouTube and subscription video on demand, while only 16% said that they knew of filtering technology on free-to-air television.

Generally, under 30s were more inclined to be aware of filtering technology across all platforms. They were significantly more likely to know about filtering technology on subscription video on demand (63%). Older respondents (60+) were less likely to be aware of filtering technology on these platforms – significantly less so on pay television (48%), YouTube (18%), and web browsers generally (43%).

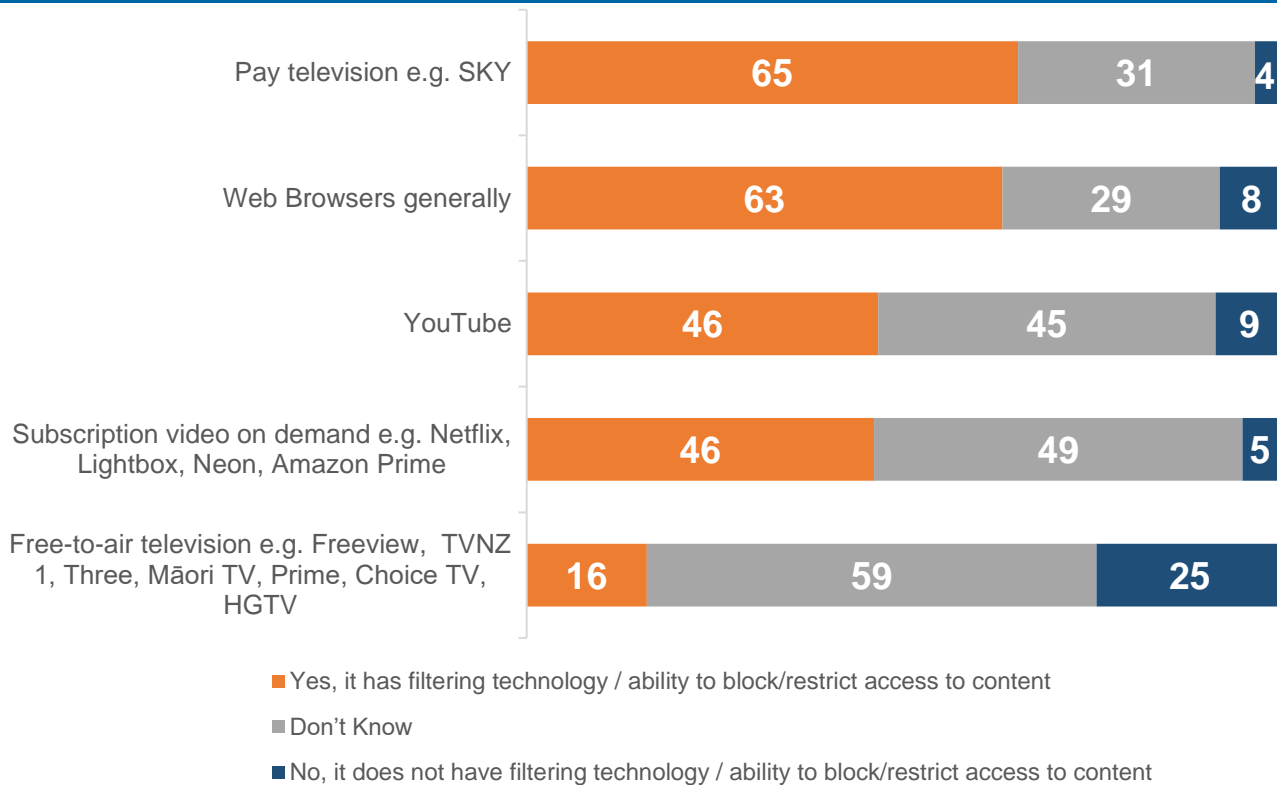
Those with a household income above \$100k were more likely to know about filtering technology on pay television (77%), subscription video on demand (54%), and web browsers generally (70%).

Those with dependent children were generally more likely to know about filtering technology across the platforms than those without dependent children. For pay television, nearly three quarters (71%) of those with dependent children knew about filtering technology; for free-to-air television, a small minority knew (13%), over half (52%) were aware of filtering technology for subscription video on demand, and a majority knew of filtering technology available on YouTube and web browsers (60% and 75% respectively).

For those without dependent children, over half knew of filtering technology for pay television and web browsers (62% and 57% respectively) and over two fifths knew of filtering technology for subscription video on demand and YouTube (43% and 40% respectively). Like those with dependent children, only a small minority were aware of filtering technology available on free-to-air television (17%).

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=1,000)

2.3 Use of filtering technology

Overall, just over two fifths of New Zealanders knew how to use filtering technology on web browsers and pay television (42% each). Less than a fifth of respondents said they didn't know how to use filtering technology on web browsers (18%) and pay television (16%). Male respondents were more likely to know how to use filtering technology on web browsers and pay television (49% and 46% respectively) compared with females (34% and 40%).

Only a small minority of New Zealanders said they personally use filtering or blocking technology, ranging from 3% to 12% across the various platforms.

Those with dependent children were more likely to know how to use filtering technology and to personally use it across web browsers, pay television, YouTube, and subscription video on demand (17-21%), than those without dependent children (3-8%).

However, there was no significant difference in personal usage of filtering technology on free-to-air television between those with dependent children (4% of 317) and those without dependent children (2% of 683). Very small proportions of those with dependent children (3%) and those without dependent children (5%) were aware of how to use or set up filtering technology on free-to-air television.

Insignificant proportions of those with dependent children (1%) and those without dependent children (3%) said they wouldn't use filtering technology on free-to-air television even if they knew how. Due to insignificant proportions, these results must be considered as indicative results.

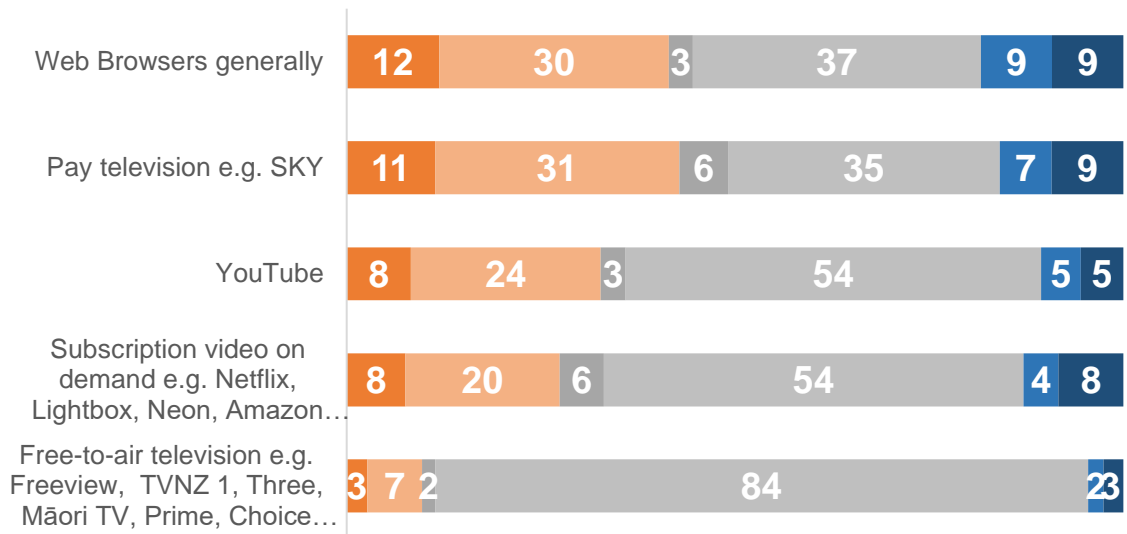
An insignificant proportion (2% or n=20) of **all respondents** said they did not know how to use filtering or blocking technology on free-to-air television, but that they would use it if they knew how; too few to investigate further or to draw any meaningful conclusions.

For pay television, those with dependent children were more likely to know how to use, and to personally use, filtering technology (21%) compared to those without dependent children (7%). 17% of respondents who do not have dependent children did not know how to use filtering technology on pay television and 14% of respondents who have dependent children also did not know how to use it. As with free-to-air television, small minorities (4% of those with dependent children, and 12% of those without dependent children) said they wouldn't use filtering technology on pay television even if they knew how to.

Younger respondents (under 30s) were more likely to know how to use filtering technology across all platforms (16%-57%), whilst older respondents (60+) were less inclined to use filtering technology (8%-25%).

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?



- 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=1,000)