

# KANTAR

## Audience Survey 2019

Te Māngai Pāho

Kantar

November 2019



Te Māngai Pāho

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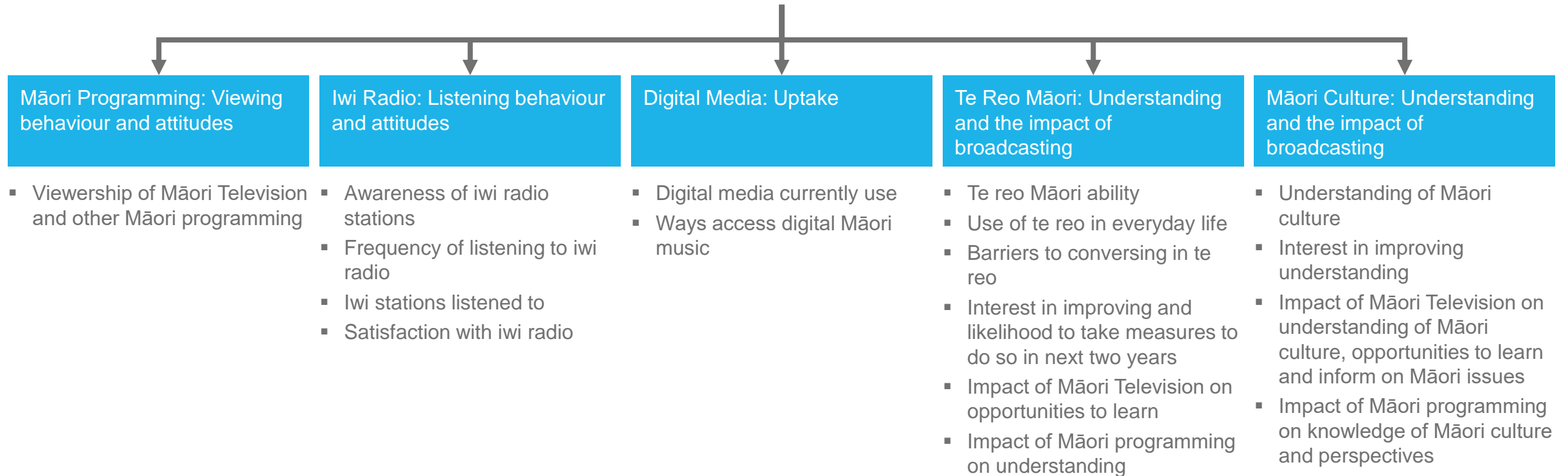
# Background

# In response to a changing media sector, Te Māngai Paho has needed to develop a new approach for measuring their performance effectiveness

- The overall vision of Te Māngai Paho is ‘Māori language – everywhere, every day, in every way!’
- To achieve this requires a greater awareness of Māori values and practises and more people speaking te reo within New Zealand
- Te Māngai Paho works towards this objective by ensuring that all New Zealanders are exposed to quality te reo Māori and tikanga Māori programming
- Overall objectives include growing audiences and growing relevance
- To date, the performance of Te Māngai Paho has been evaluated by quantifying the impact broadcasting has on audience’s perspectives and understanding of te reo Māori and tikanga Māori
- This has been measured via an annual Audience Study conducted by Kantar TNS focussing on the audiences of the General Māori Population, Māori Youth and the Rest of New Zealand Population
- The media and communications sector has however been changing rapidly with an increase in delivery platforms leading to increased audience fragmentation
- As a response to these changes, Te Māngai Paho has needed to develop an alternative approach for measuring the effectiveness of their strategies and funding to focus on the ZePA measurement scale and a right-shift approach
- The ZePA model is a learning continuum that comprises three major states: Zero – in which there is no use or no receptivity towards te reo, Passive – in which an individual is accommodating of te reo and Active – in which an individual actively strives to advance te reo
- To normalise and revitalise Māori language and culture, the population needs to be continually moved along this continuum which is referred to as ‘Right- shifting’
- A right-shift can be achieved by either moving an individual from one zone to another or shifting an individual within a zone
- Te Māngai Paho now need to redevelop their approach to surveying the New Zealand population to effectively measure and track performance based on a ZePA model approach for the 2018/19 financial year and to report on key audiences
- This report outlines the findings from the audience perspective focussing on the General Māori Population, Māori Youth and the Rest of New Zealand Population

# To assess the quality and effectiveness of programming among audiences, the following areas have been addressed within the research in 2019

What insights can be gained from current media behaviour and attitudes to guide strategic future directions for Te Māngai Pāho?



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## Key insights

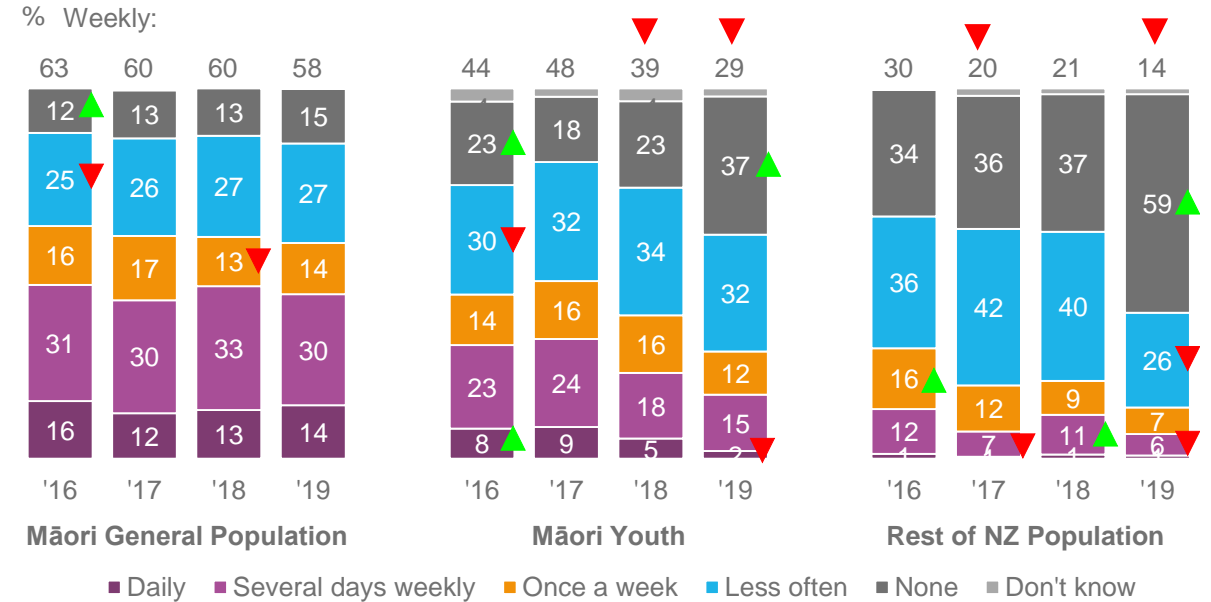
# Frequency of viewing Māori Television is relatively stable among both the Māori General Population but has declined among Māori Youth and the Rest of NZ Population

## Television viewing behaviour

### Frequency of viewing Māori Television:

- Weekly viewing of Māori Television in the last 3 months is stable among the Māori General Population at 58% with 44% viewing several days weekly
- Among Māori Youth, frequency of viewing continues to decline with only 29% viewing weekly compared to 39% in 2018
  - The decrease among Māori Youth is mainly due to lower levels of viewership among the Receptive Audience but both Fluent Speakers and Second Language Learners also have lower viewership than two years ago
- Fluent Speakers however remain the most common viewers of Māori Television among both the Māori General Population and Māori Youth
- Among the Rest of NZ Population, 14% currently view Māori Television on a weekly basis down from 21% in 2018
- Among viewers, Māori Television programming is most commonly viewed via a television although two in five within the Māori General Population and Māori Youth also view via the internet
- Not watching much television or having enough time are common reasons for not viewing Māori Television among Māori audiences while not speaking te reo and a lack of interest are common reasons among the Rest of NZ Population

## Frequency of viewing Māori Television in last 3 months



Weekly viewers (2019):	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	83% ▲	60%	38% ▼	33% ▼
Māori Youth	59% ▲	34%	13% ▼	15%

NOTES:  
1. Caution low base size among the Non Receptive Audiences

▲ ▼ Significantly higher / lower than previous year / other language groups at 95 C.L.

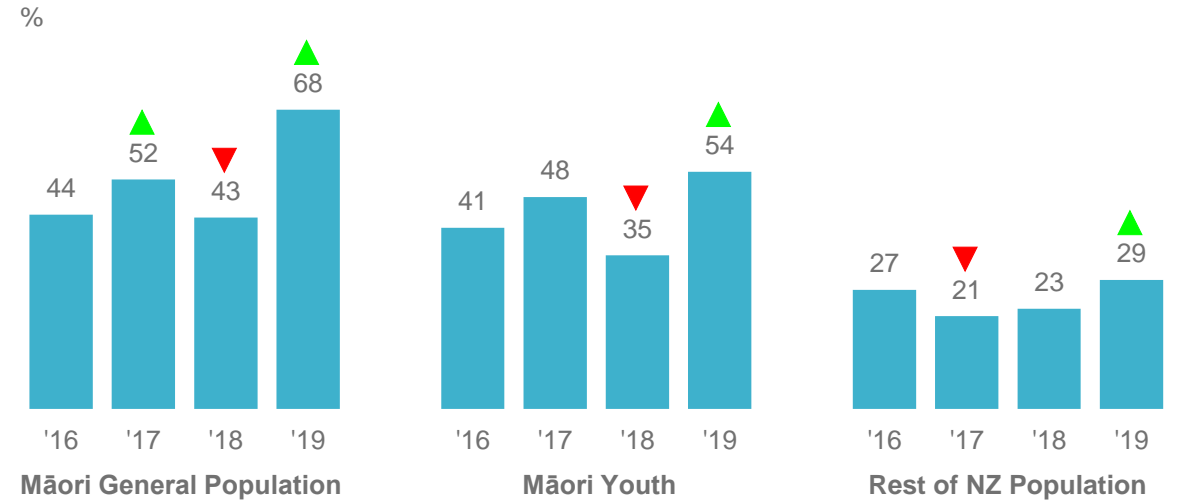
# However viewing of general Māori programming on mainstream channels is heightened among all groups of interest

## Television viewing behaviour (cont'd)

### Viewership on mainstream channels:

- The definition of Māori programming in the survey was extended in 2019 to also refer to programmes that include aspects of 'Māori perspectives or society'
- Two in three within the Māori General Population, one in two Māori Youth and three in ten within the Rest of NZ Population have viewed Māori programming on mainstream channels within the last 3 months, being higher than previous claimed levels
- Fluent Speakers are most likely to view Māori programming on mainstream channels among both the Māori General Population and Māori Youth while the Receptive and Non Receptive Audiences are less likely to
- TV One remains the most common mainstream channel for viewing Māori programming among all groups

### Viewed Māori programming in the last three months on mainstream channels



Watched (2019):	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	82 ▲	73 ▲	53 ▼	38 ▼
Māori Youth	69 ▲	59	48 ▼	24 ▼

NOTES:  
1. Caution low base size among the Non Receptive Audience

▲ ▼ Significantly higher / lower than previous year / other language groups at 95 C.L.



# Frequency of listening to iwi radio is stable among the Māori General Population but continues to decline among Māori Youth

## Iwi radio

### Awareness:

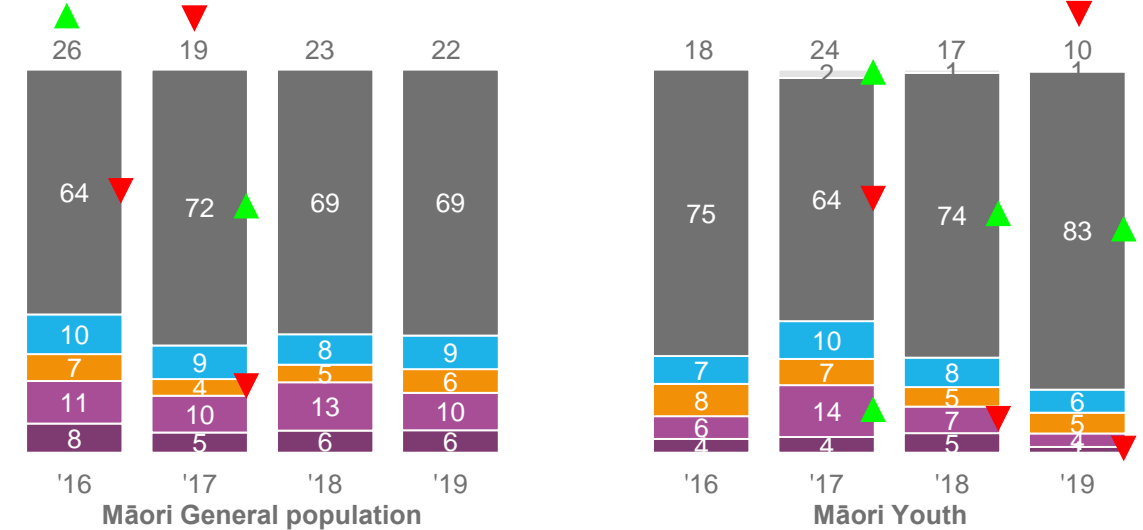
- Two in five within the Māori General Population (42%) and 24% of Māori Youth claim to be aware of at least one specific iwi radio station - although on prompting 45% of Māori Youth recognise at least one iwi radio station name
- Awareness remains moderate for whether the iwi with which they most identify operates a radio station, being only 33% of the Māori General Population and 18% of Māori Youth

### Frequency of listening and satisfaction:

- The frequency of listening to iwi radio remains stable among the Māori General Population, with 16% currently listening several days weekly
- There has however been a decline in listening among Māori Youth with only 5% currently listening several days weekly compared to 12% in 2018
- Among both groups, Fluent Speakers most commonly listen to iwi radio
- Among listeners, radio is most common but 35% also listen to iwi radio via the internet
- There is very little dissatisfaction with iwi radio among listeners (at 3%) but the Māori General Population are more likely to be 'very satisfied' (at 37%) than Māori Youth (at 21%)

## Frequency of listening to iwi radio

% Fortnightly:



	Listen at least fortnightly (2019)	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	47%▲	18%▼	8%▼	4%▼	
Māori Youth	24%▲	12%	5%▼	0%	

NOTES:  
1. Caution low base size among the Non Receptive Audience

▲ ▼ Significantly higher / lower than previous year / other language groups at 95 C.L.

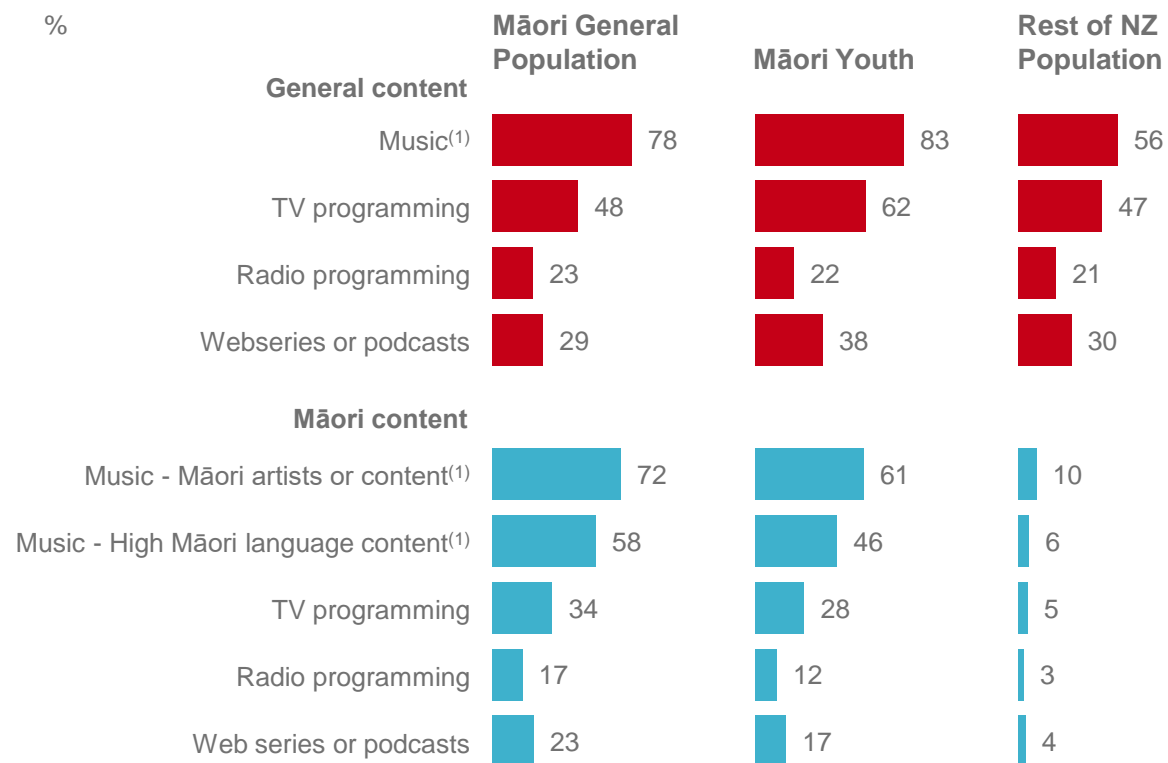
# Despite similar levels of access for general digital content, Māori Youth continue to lag slightly behind the General Population for accessing digital Māori content

## Digital media

### Current digital media use:

- Accessing all types of general digital content is generally stable among the Māori General Population and Māori Youth although accessing radio content has decreased among Māori Youth following an increase in 2018
- After decreasing in 2018, accessing Māori television programming via the internet is back to previous levels among the Māori General Population and Māori radio programming is heightened
- Despite the high access of general content, accessing digital media with Māori content among Māori Youth remains stable but slightly lower than among the Māori General Population
- YouTube is the most common means to access digital Māori music among Māori groups followed by Spotify
- Among the Rest of NZ Population, there has been an increase in accessing general web series or podcasts and accessing television programming via the internet continues to slowly trend upward
- There continues to be only low consumption of Māori digital media among the Rest of NZ Population

### Digital media via the internet – regularly accessed (2019)



NOTES:

1. Music includes via the internet or saved on devices such as an MP3 player, iPod or mobile phone

# Two in five within the Māori General Population and one third of Māori Youth have conversations in te reo Māori at least weekly

## Māori language

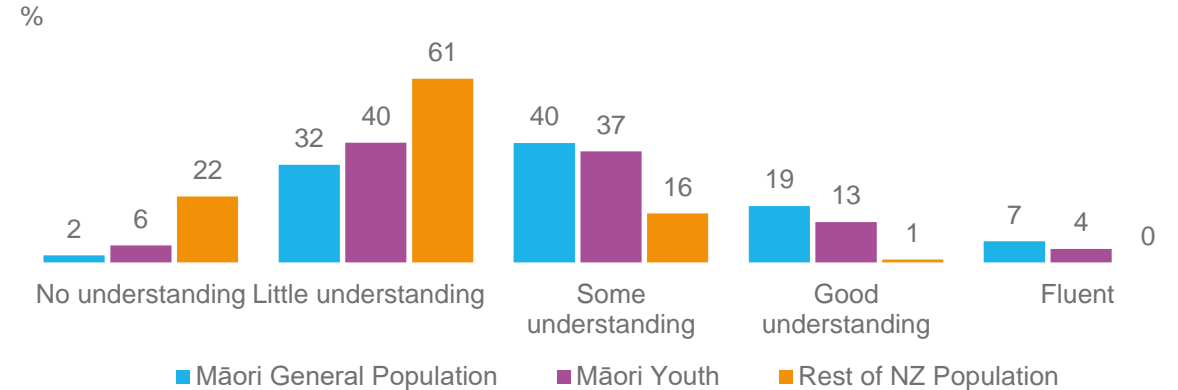
### Māori language ability and use:

- 65% within the Māori General Population and 55% of Māori Youth claim to have at least some understanding of te reo beyond greetings and basic words
- One in four within the Māori General Population and one in five Māori Youth use te reo in conversations on a daily basis
  - However 41% of the Māori General Population and 50% of Māori Youth never converse in te reo
- Few within the Rest of NZ Population use te reo in everyday life with most reporting to have little or no understanding
- The main barrier to using te reo more often in everyday life is te reo knowledge or ability among all audience groups
- Other common barriers are not knowing many te reo speakers, not having formally studied te reo and concern about either using an incorrect word or mispronouncing a word

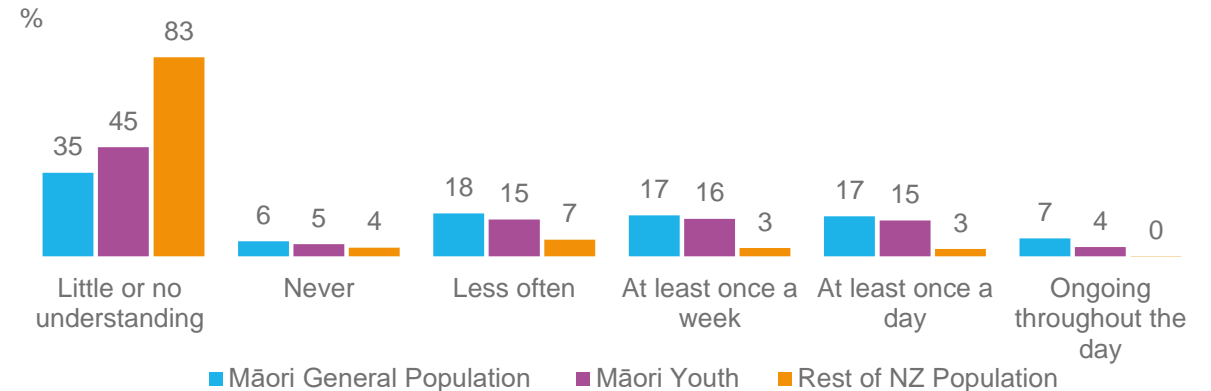
### Interest in improving:

- Most within the Māori General Population (89%) and Māori Youth (83%) are interested in improving their te reo ability and similarly claim to be likely to do so in the next two years, although many only somewhat
- Half within the Rest of NZ Population are interested in improving although only 13% are very likely to do so within the next two years

## Māori language ability (2019)



## Use of te reo Māori for conversations in everyday life (2019)



# In addition to providing opportunity to learn, Māori viewers of Māori Television are increasingly agreeing that their te reo ability has improved as a direct result

## Māori language (cont'd)

### Impact of television on te reo:

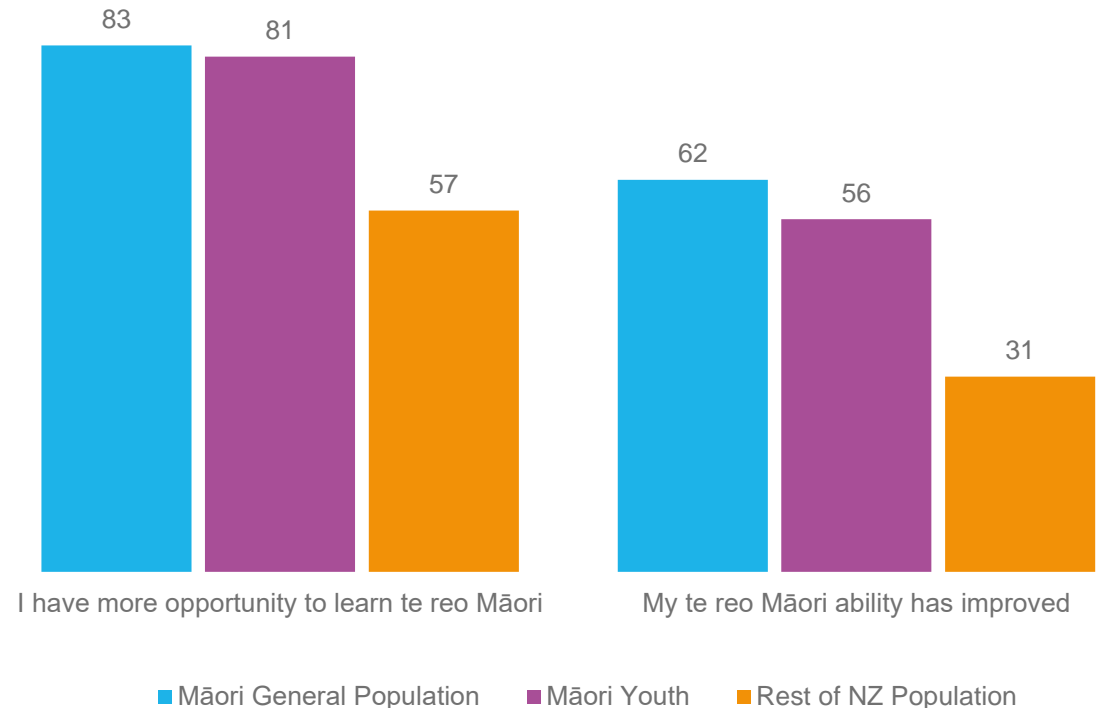
- Māori Television remains effective in providing opportunities to learn te reo Māori with agreement stable among the Māori General Population at 83% and Māori Youth at 81%
- Furthermore, Māori Television viewers are increasingly agreeing that their te reo ability has improved as a result of Māori Television, increasing to 62% among the Māori General Population and 56% of Māori Youth
- Among Rest of NZ Population viewers, three in five continue to agree that Māori Television provides opportunity to improve their te reo and 31% that their ability has improved

### Impact of Māori programming (including radio):

- Three in five within the Māori General Population (64%) and Māori Youth (59%) and one third within the Rest of NZ Population who access Māori programming agree that their understanding of te reo Māori has increased, being an improvement on 2018 levels <sup>(1)</sup>

## Impact of Māori Television among viewers (2019)

%



#### NOTES:

1. Rated 3 to 5 on a 5 point scale where 1 is 'Not at all' and 5 is 'A great deal'

# Few within the Rest of NZ Population claim to have a good understanding of Māori culture although most have some

## Māori culture

### Understanding of Māori culture:

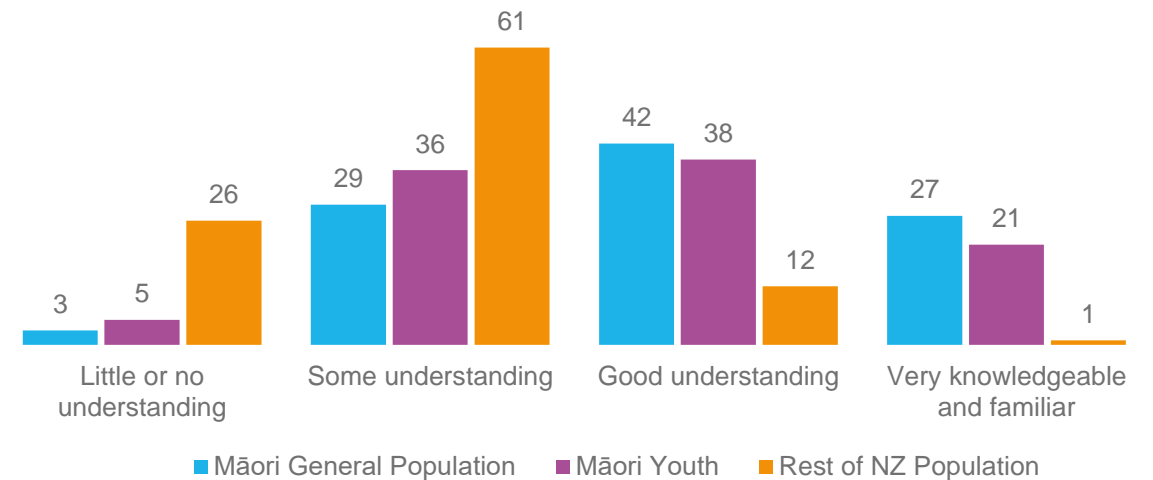
- Overall two in three among the Māori General Population (69%) report having a good understanding or being very knowledgeable about Māori culture and 59% of Māori Youth
- This does differ by language ability group, being the majority of Fluent Speakers but more moderate among the Receptive and Non Receptive Audiences
- Most within the Rest of NZ Population only have some or little understanding of Māori culture

### Interest in learning more:

- Most within the Māori General Population (86%) and Māori Youth (81%) are interested in learning more about Māori culture and half of the Rest of NZ population

## Understanding of Māori culture (2019)

%



Very knowledgeable or good understanding (2019):	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	97% ▲	74%	41% ▼	37% ▼
Māori Youth	92% ▲	74%	37% ▼	20% ▼

NOTES:

1. Caution low base size among the Non Receptive Audience

▲ ▼ Significantly higher / lower than other language groups at 95 C.L.

# Viewers of Māori Television are increasingly agreeing that their knowledge of Māori culture has improved and that they are better informed on Māori issues

## Māori culture (cont'd)

### Impact of Māori Television:

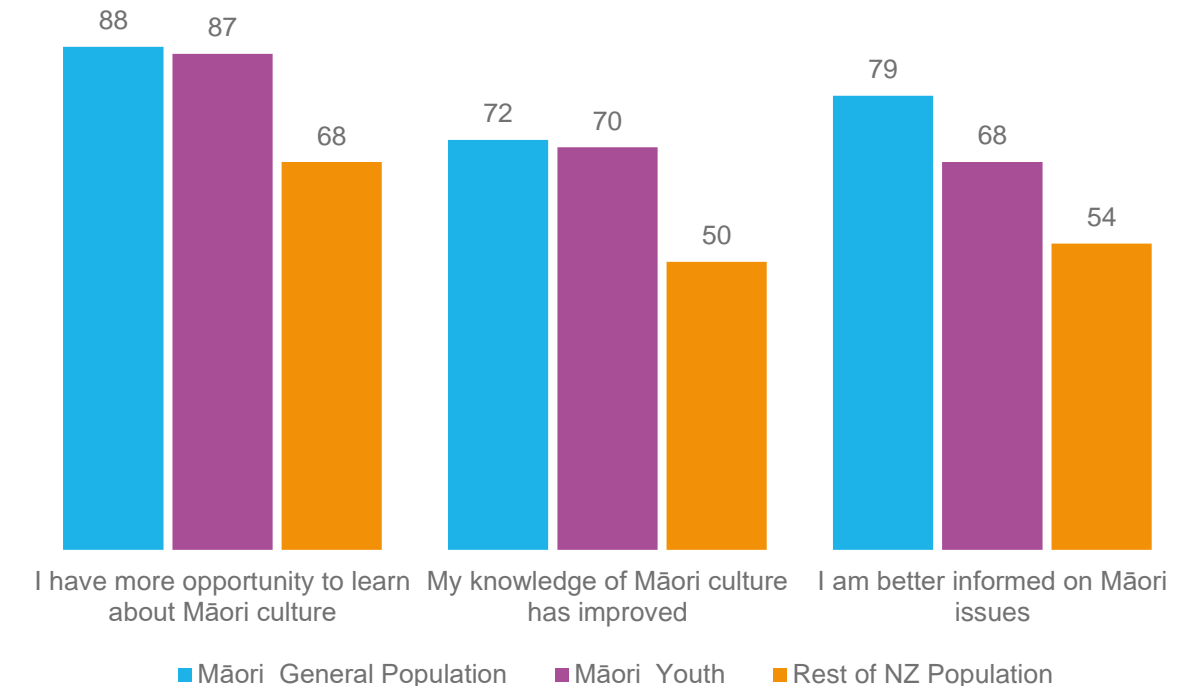
- Agreement remains high among Māori Television viewers that Māori Television provides more opportunity to learn about Māori culture
- There has been an increase among viewers within the Māori General Population and Māori Youth that their knowledge of Māori culture has improved as a result of Māori Television
- Viewers among the Māori General Population and Rest of NZ Population have increased in agreement that they are better informed on Māori issues as a result of Māori Television

### Impact of Māori programming (including radio):

- Among viewers of Māori programming, there has been an increase in agreement (rating 3 to 5) among all audience groups that their understanding of Māori culture and their awareness and knowledge of Māori perspectives has improved

## Impact of Māori Television among viewers (2019)

%



#### NOTES:

1. Rated 3 to 5 on a 5 point scale where 1 is 'Not at all' and 5 is 'A great deal'

# Overall insights

## Te reo and Maori culture

- Even among Maori audiences, many consider themselves to have only some understanding of te reo or to have little understanding other than greetings and a few basic words
- Lack of ability is a key barrier to using te reo in everyday life, alongside concerns about mispronunciation and incorrect word use
- Maori audiences are more confident about their knowledge of Maori culture but there is still opportunity to improve
- Encouragingly the majority of the Maori General Population and Maori Youth, and half the Rest of NZ Population, would like to improve their knowledge but many also acknowledge that they are unlikely to take active measures to do so
- Broadcasting remains well positioned to support and help improve te reo and Maori culture understanding and ability
- But being most commonly accessed by those with a good understanding of te reo already, the challenge remains attracting those who have limited or no te reo ability and are more passive in their interest to improve

## Television

- Māori Television continues to play an important role in supporting understanding of te reo and Māori culture and is increasingly successful at also helping to improve ability among viewers
- It is encouraging that viewing of Māori Television has remained stable among the Māori General Population
- However, there continues to be a decrease in viewership among Māori Youth highlighting the challenge of attracting this audience from other competing media and entertainment options
- With viewing differing by language ability among Māori audiences and with declining viewers among the Rest of NZ Population, a key challenge remains attracting those with limited or no te reo ability to become more engaged with Maori television programming
- The mainstream channels remain well positioned to engage those not proactively seeking programming with Māori content – although providing content that subtly promotes Māori culture and values may be the best means to attract some viewers, there is also opportunity to provide more overt Māori programming to engage with the Rest of NZ population interested in improving

# Overall insights

## Iwi radio

- Iwi radio captures only a small proportion of overall daily radio listening
- Many within the Māori General Population have no engagement with iwi radio, listening has halved among Māori Youth and regular listeners remain most commonly fluent speakers of te reo
- Key priorities for building listeners remain increasing awareness of iwi radio stations, attracting new listeners and increasing the frequency of listening
- Although listeners are generally satisfied with iwi radio, there is opportunity for improvement and changes may also be required to attract new listeners and to effectively compete against the mainstream radio stations

## Digital media

- With general digital access stable among the Māori General Population, it is positive to see increases in access to digital Māori content among this group
- Digital media continues to present opportunity for engagement among Māori Youth but the challenge remains converting the high access of general digital content, such as television programming and web series, to accessing Māori digital content by attracting new users
- Although Māori music is most commonly accessed via YouTube, Spotify offers opportunity to provide content to two in five within the Māori audiences and as such is worth utilising



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## Māori Television and programming

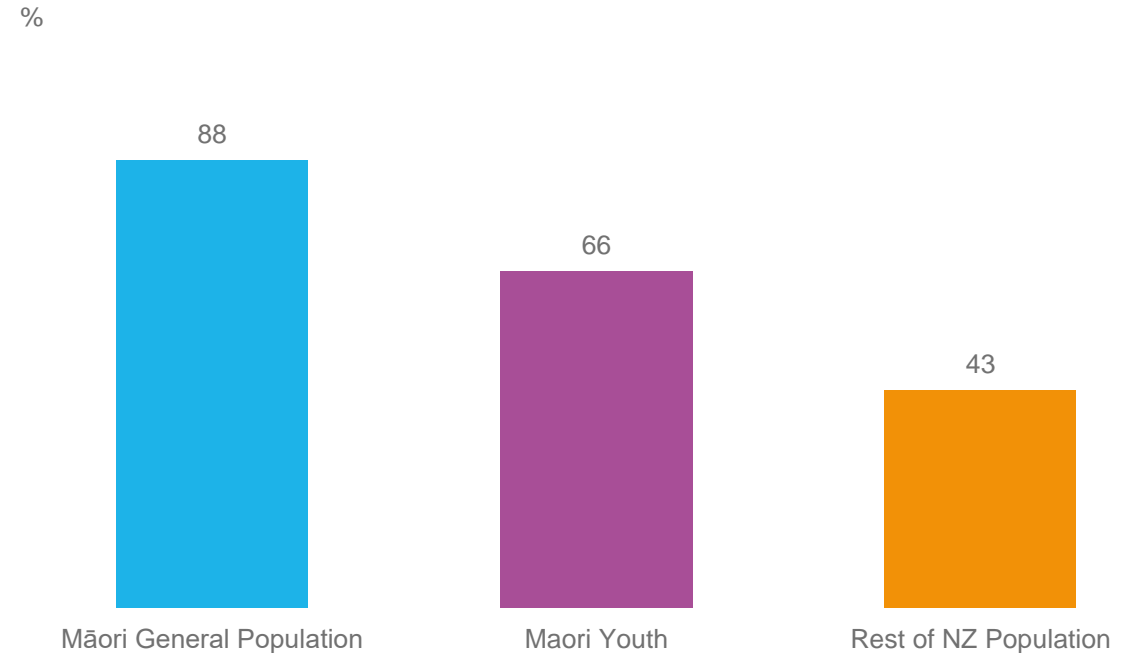
# The majority of the Māori General Population have viewed Māori Television in the past 12 months and two in three Māori Youth

## Key findings

- The majority of the Māori General Population have viewed Māori Television in the past 12 months and two in three Māori Youth
- Viewership is highest among Fluent Speakers and Second Language Learners within both audience groups
- Two in five within the Rest of NZ Population have viewed Māori Television in the past 12 months

Watched (2019):	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	97 ▲	92 ▲	77 ▼	67 ▼
Māori Youth	85 ▲	77 ▲	55 ▼	24 ▼

## Viewed Māori Television in the past 12 months



Source: Have you watched the Māori Television channel over the past 12 months, including the Te Reo channel? This could be live television, recorded programming, on demand viewing or live streaming via Facebook?

Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ Population n = 1500 | (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

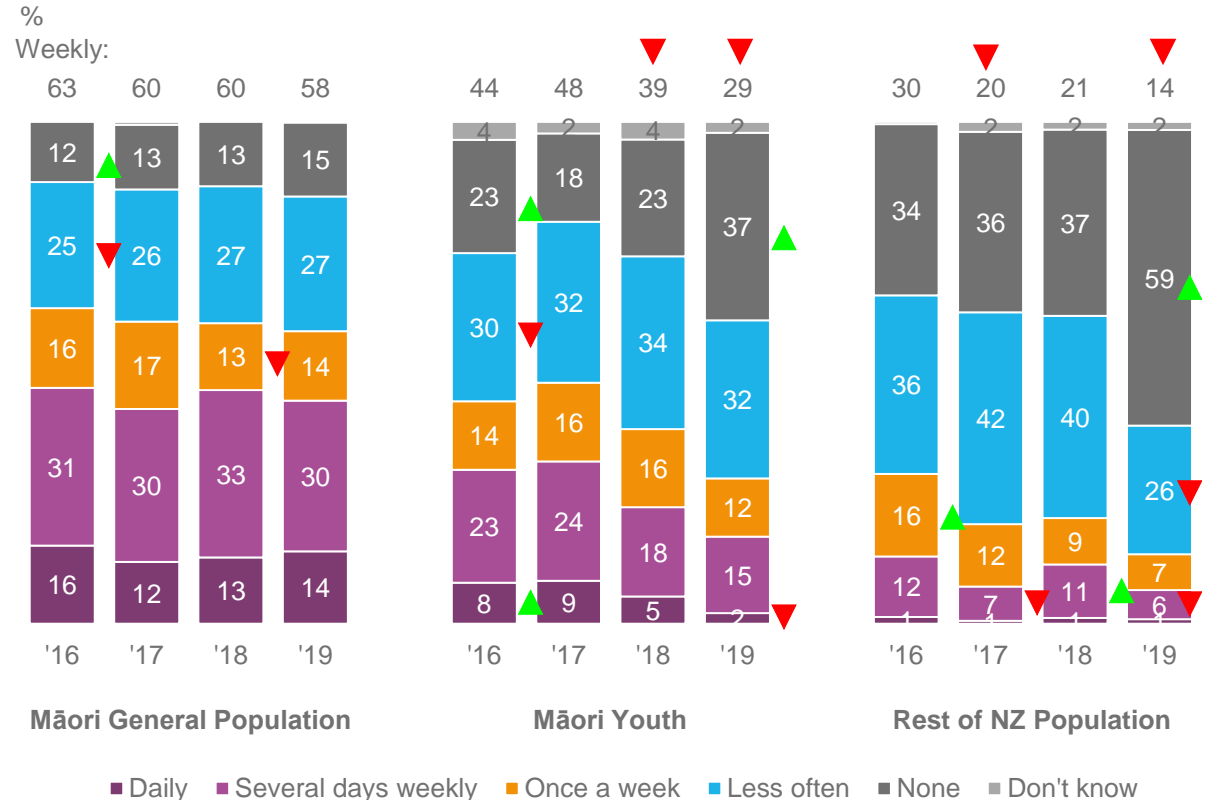
▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

# Weekly viewing of Māori Television programming is stable among the Māori General Population but has decreased among both Māori Youth and the Rest of NZ Population

## Key findings

- Weekly viewing of Māori Television in the last 3 months is stable at 58% among the Māori General Population with 44% viewing several days weekly
- Weekly viewing of Māori Television continues to decline among Māori Youth to 29% while those watching several days weekly is now 17% compared to 23% in 2018 and 33% in 2017
  - The number viewing no Māori Television programming in the last 3 months has increased to 37% compared to 23% in 2018
- Weekly viewership has also decreased among the Rest of NZ Population to 14% with three in five having viewed no Māori Television programming in the last 3 months

## Frequency of viewing Māori Television in last 3 months



Source: Over the last three months, how often have you watched Māori Television programming, either live, recorded or on demand?

Base: n = 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012; Māori Youth: n = 32 | 341 | 361 | 472; Rest of NZ Population: n = 400 | 570 | 600 | 1500

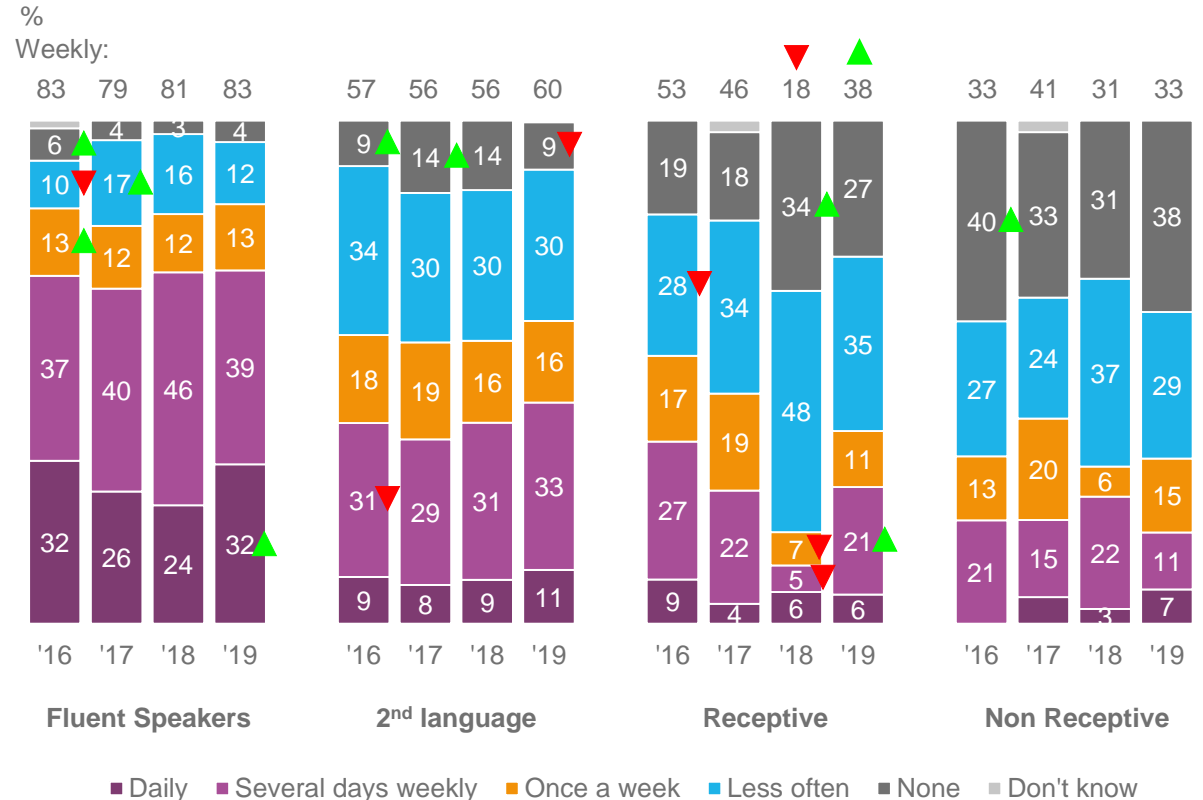
▲ ▼ Significantly higher / lower than previous year at 95% C.L.

# Within the Māori General Population, daily viewing of Māori Television has increased among Fluent Speakers and remains stable among 2nd Language Learners

## Key findings

- Among the Māori General Population, Fluent Speakers in te reo remain the most frequent viewers of Māori Television with four in five viewing at least weekly and daily viewers increased from 24% in 2018 to 32%
- Similar to previous years, weekly viewership is stable among Second Language Learners at three in five with 44% viewing several days weekly
- Currently 38% among the Receptive Audience view Māori Television programming at least weekly with one in four doing so several days a week
  - Although higher than in 2018, weekly viewing remains lower than the level among the Receptive Audience in 2017 and 2016
- Weekly viewership is stable among the Non Receptive Audience at 33% with the number of non viewers currently 38%

## Viewing of Māori Television in last 3 months by FSR group – Māori General Population



Source: Over the last three months, how often have you watched Māori Television programming, either live, recorded or on demand?  
 Base: Māori General Population (n = F,S,R,N): 2016 (n = 184, 291, 76, 49) | 2017 (n = 181, 332, 81, 39) | 2018 (n = 201, 314, 59, 29) | 2019 (256, 399, 303, 54)

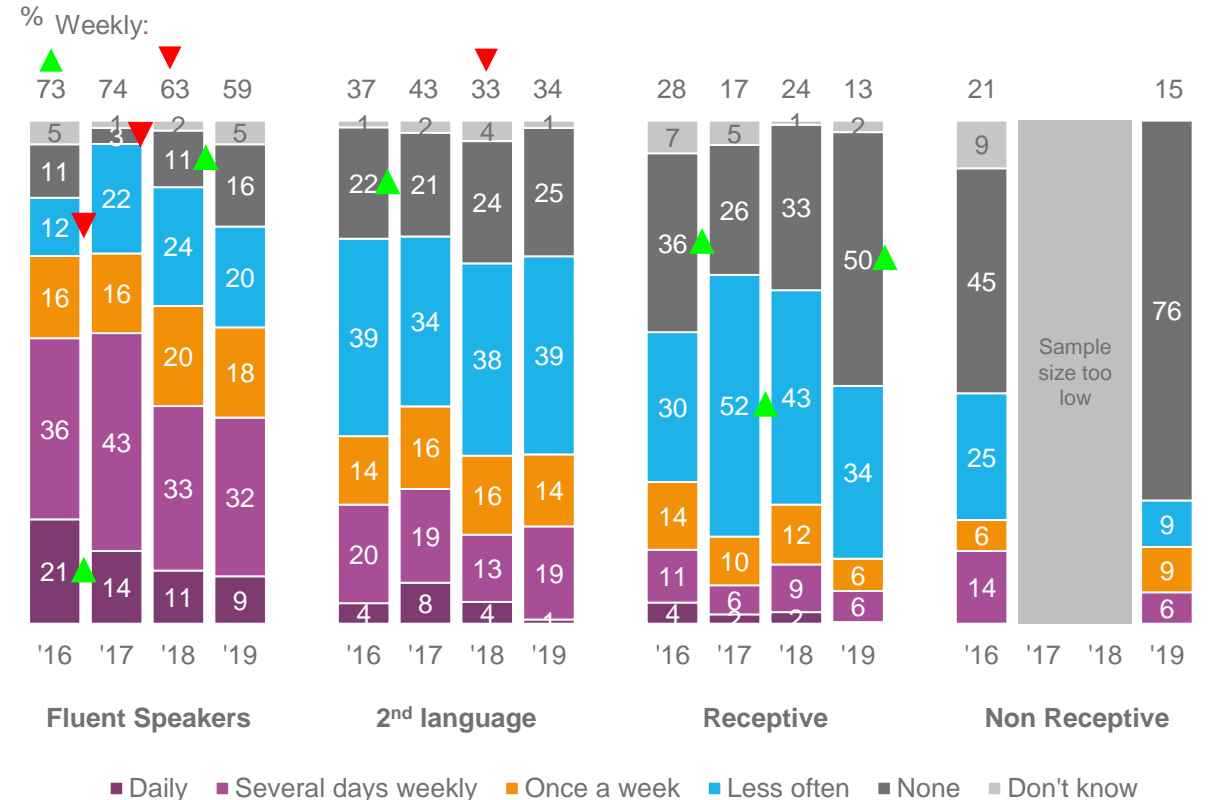
▲ ▼ Significantly higher / lower than previous year at 95% C.L.

# Weekly viewing of Māori Television programming is stable among Fluent Speakers and 2<sup>nd</sup> Language Learners within Māori Youth but is very low among Receptive and Non-receptive

## Key findings

- Among Māori Youth, weekly viewing of Māori Television is stable at 59% among Fluent Speakers with two in five viewing several days weekly, although this remains lower than viewership level in 2017 and 2016
- Weekly viewership is also stable among 2<sup>nd</sup> Language Learners at 34% but, similar to Fluent Speakers, regular viewing of several days weekly remains lower than in 2017 and 2018
- Although not statistically significant, weekly viewing has decreased to only 13% among the Receptive Audience and half have viewed no Māori Television programming over the last 3 months
- Among the Non Receptive Audience, weekly viewing is similar to the Receptive Audience at 15% however three in four have viewed no programming over the last 3 months

## Viewing of Māori Television in last 3 months by FSR group – Māori Youth



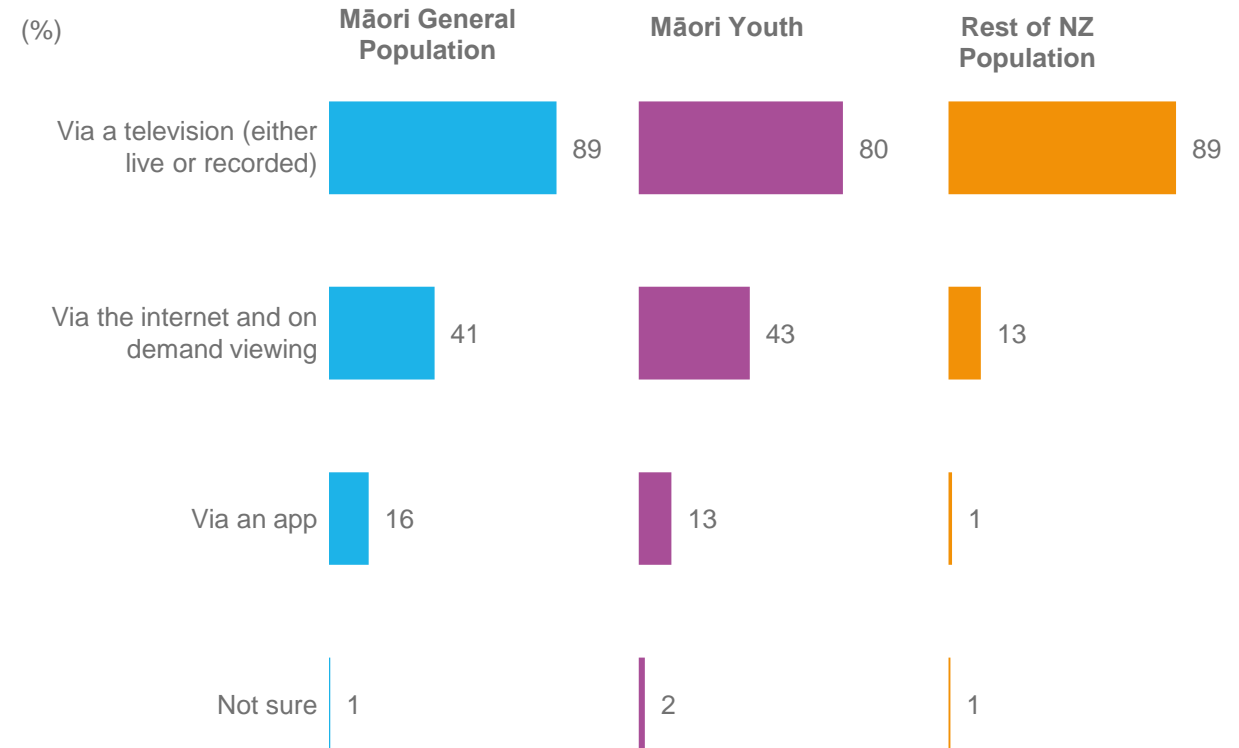
Source: Over the last three months, how often have you watched Māori Television programming, either live, recorded or on demand?  
 Base: Māori Youth (n = F,S,R,N): 2016 (n = 88, 177, 36, 31) | 2017 (n = 95, 184, 44, 18) | 2018 (n = 91, 204, 53, 13) | 2019 (87, 178, 173, 34)

# Although television is the most common way to view Māori Television programming, two in five within the Māori audiences also view via the internet and on demand viewing

## Key findings

- The majority of viewers in all audience groups watch Māori Television programming via a television (either live or recorded)
- Two in five among the Māori General Population and Māori Youth also view Māori Television programming via the internet and on demand viewing
- Although less commonly used, 16% of the Māori General Population and 13% of Māori Youth watch programming via an app

## Ways commonly view Māori Television programming (among viewers in the past 12 months)



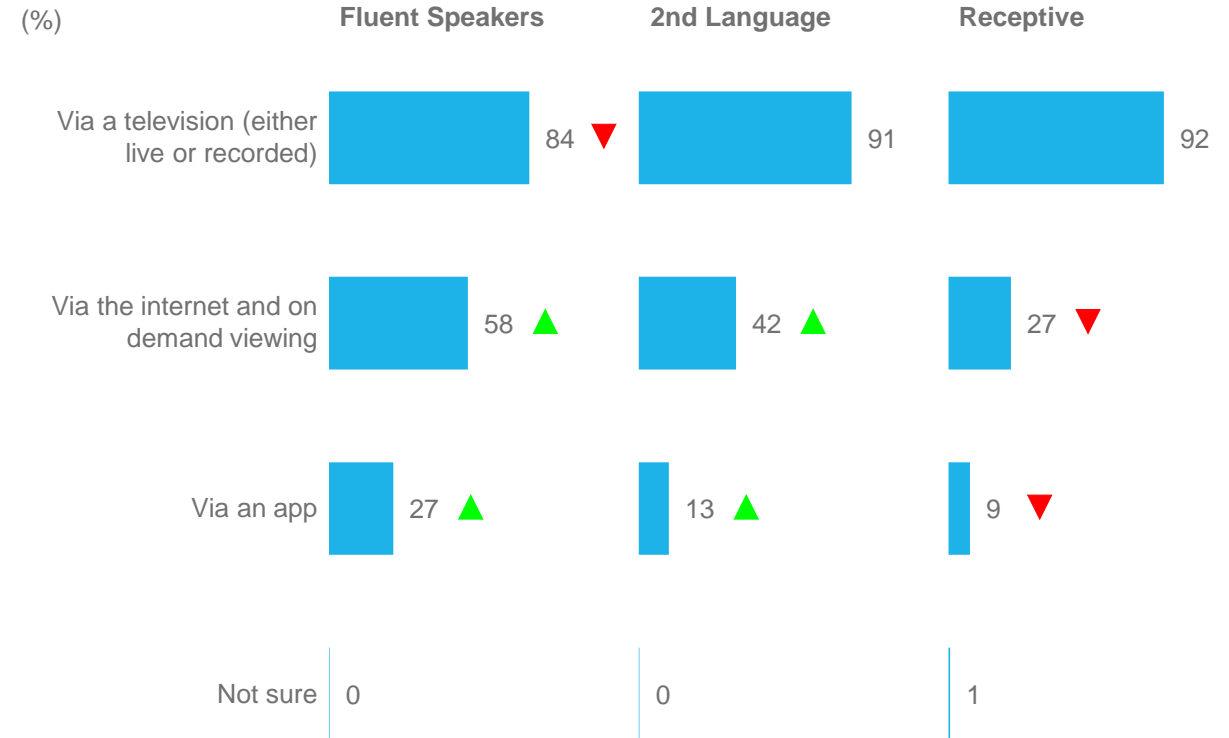
Source: In which of the following ways do you most commonly view Māori Television programming?  
 Base: Māori Television viewers within the past 12 months: Māori General Population n = 884 | Māori Youth n = 324 | Rest of NZ n = 635

# Within the Māori General Population, Fluent Speakers are most likely to view Māori Television via the internet or via an app

## Key findings

- Māori Television is most commonly viewed via a television among all language groups within the Māori General Population
- Fluent Speakers are most likely to view via the internet and on demand viewing at 58% followed by 2<sup>nd</sup> Language Learners at 42% and the Receptive Audience at 27%
- Among viewers, Fluent Speakers are also the most likely to be viewing via an app at around 27% compared to around one in ten within the other language groups

## Ways commonly view Māori Television by FSR group – Māori General Population (among viewers in the past 12 months)



Source: In which of the following ways do you most commonly view Māori Television programming?

Base: Māori Television viewers within the past 12 months: Māori General Population - Fluent Speakers n = 248 | 2nd Language Learners n = 365 | Receptive n = 235

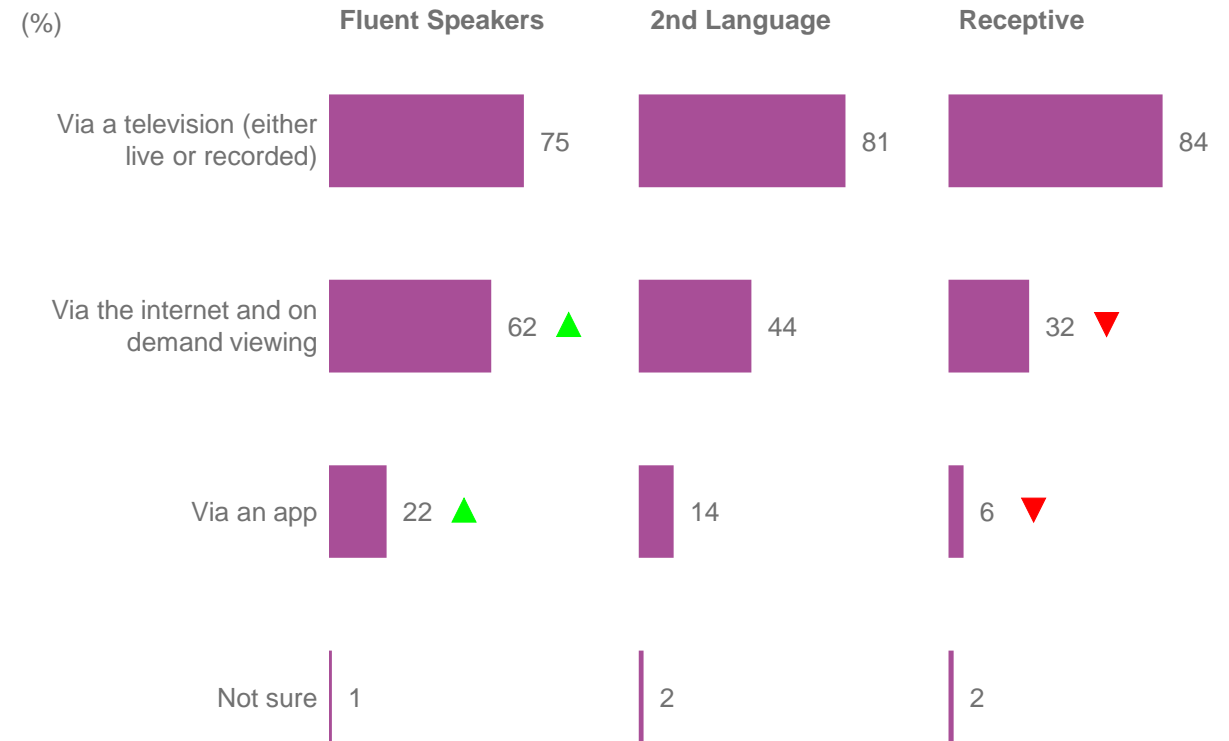
▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

# Reflective of the Māori General Population, within Māori Youth viewing Māori programming via the internet or via an app is most common among Fluent Speakers

## Key findings

- Among Māori Youth, almost as many Fluent Speakers view Māori Television programming via the internet and on demand viewing (at 62%) as they do via a television (at 75%)
- Among 2<sup>nd</sup> Language Learners and the Receptive Audience, Māori Television is most commonly viewed via the television however viewing via the internet is also common at 44% among 2<sup>nd</sup> Language Learners and 32% among the Receptive Audience
- Viewing via an app is most common among Fluent Speakers at 22%

## Ways commonly view Māori Television by FSR group – Māori Youth (among viewers in the past 12 months)



Source: In which of the following ways do you most commonly view Māori Television programming?  
 Base: Māori Television viewers within the past 12 months: Māori Youth - Fluent Speakers n = 76 | 2nd language learners n = 141 | Receptive n = 99

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

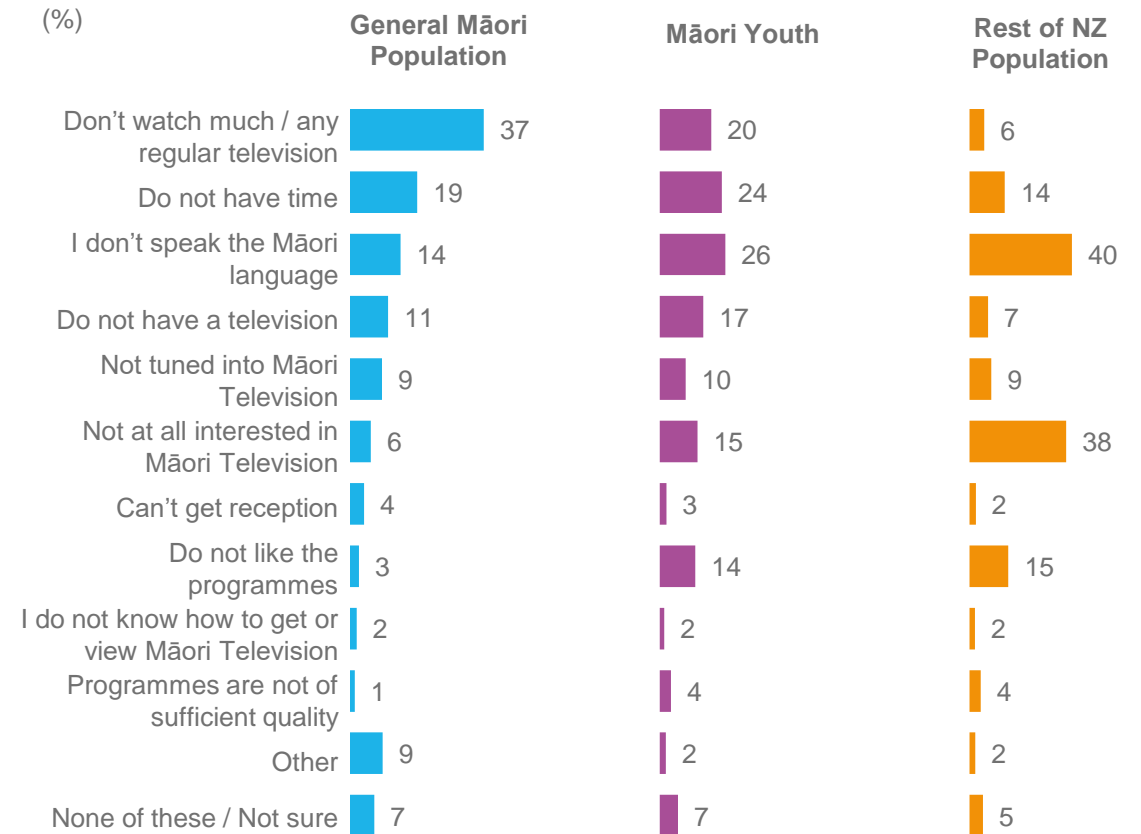


# Not watching much regular television or having enough time are common reasons for not viewing Māori Television among Māori audiences

## Key findings

- Not watching much or any regular television is the main reason for not viewing Māori Television programming among non-viewers within the General Māori Population followed by not having enough time
- Among Māori Youth, main reasons for not viewing are inability to speak te reo, not having enough time and either not watching much regular television or not having a television
- The main reasons for not viewing Māori Television among the Rest of NZ Population are not being able to speak te reo and a lack of interest in the channel

## Reasons for not watching Māori Television programming (among non viewers within the last 3 months)



Source: Can you please tell me why you have not watched Māori Television programming in the last 12 months? 3 months?

Base: Non viewers of Māori Television viewers within the past 3 months: Māori General Population - Māori General Population n = 149 | Māori Youth n = 145 | Rest of NZ Population n = 824

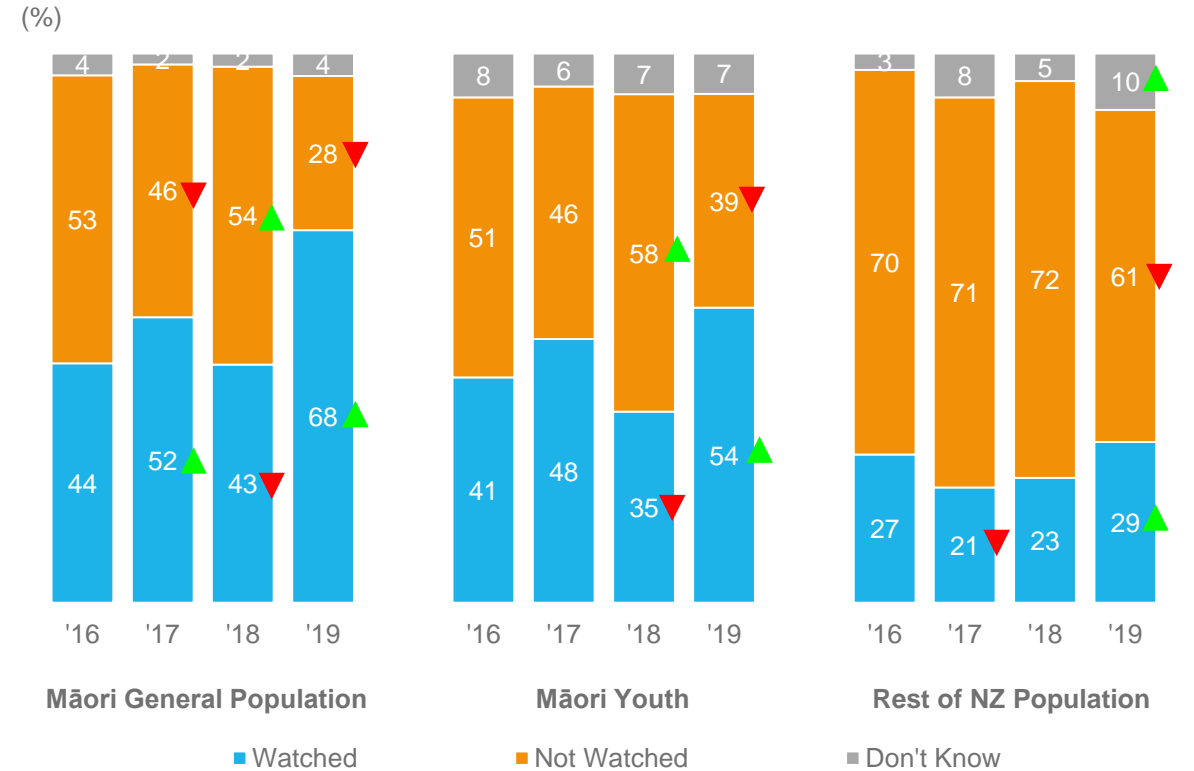
# Two thirds of the Māori General Population, half Māori Youth and three in ten within the Rest of NZ Population have viewed Māori programming on mainstream channels in past 3 months

## Key findings

- The definition of Māori programming in the survey was extended in 2019 to also refer to programmes that include aspects of 'Māori perspectives or society'
- Two in three within the Māori General Population, one in two Māori Youth and three in ten within the Rest of NZ Population have viewed Māori programming on mainstream channels within the last 3 months, being higher than previous claimed levels
- Among the language segments, Fluent Speakers of te reo remain the most likely to view Māori programming on mainstream channels among both the Māori General Population and Māori Youth followed by Second Language Learners

Watched (2019):	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	82 ▲	73 ▲	53 ▼	38 ▼
Māori Youth	69 ▲	59	48 ▼	24 ▼

## Viewership of Māori language / culture programmes on mainstream channels in the last 3 months



Source: I am now going to ask you some questions about your viewing habits for Māori programmes across the other television channels. In the last three months have you watched any programmes in te reo Māori or any programmes that include aspects of Māori culture, perspectives or society? These programmes could be in English or te reo.

Base: n = 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012; Māori Youth: n = 32 | 341 | 361 | 472; Rest of NZ Population: n = 400 | 570 | 600 | 1500; (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# TV One remains the most common mainstream channel for viewing Māori programming among the Māori General Population

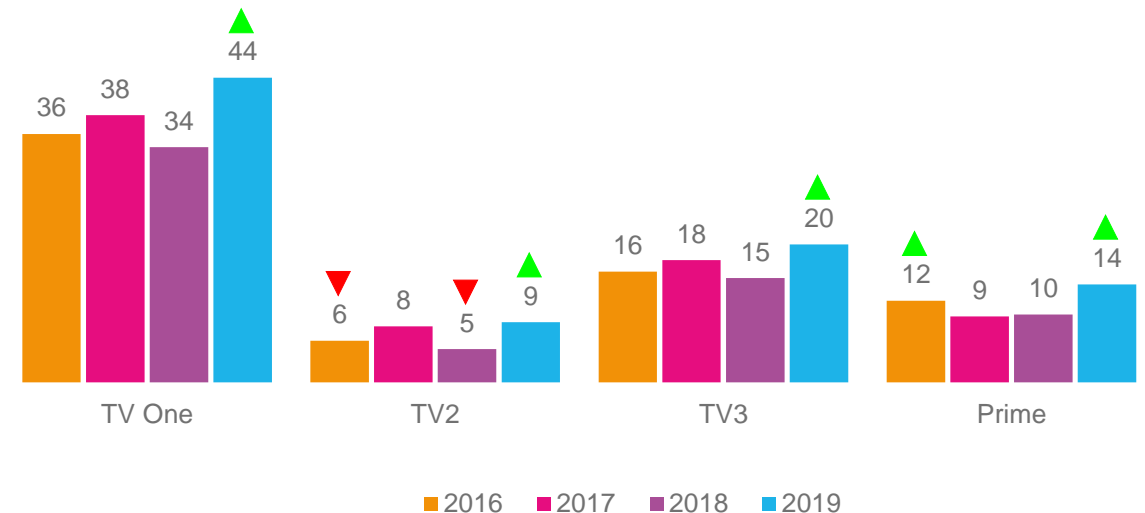
## Key findings

- Claimed viewing of Māori programming among the Māori General Population remains most common for TV One at 44% followed by TV3 at 20%
- 14% currently claim to view Māori programming via Prime and 9% via TV2

Watched (2018): <sup>(1)</sup>	Fluent Speakers	Second Language	Receptive Audience <sup>(1)</sup>	Non Receptive
TV One	60 ▲	45	31 ▼	26 ▼
TV2	11	9	7	6
TV3	27 ▲	21	15 ▼	2 ▼
Prime	19 ▲	15	10 ▼	2 ▼

## Mainstream channels used for viewing Māori programming – Māori General Population

(%)



Source: I am now going to ask you some questions about your viewing habits for Māori programmes across the other television channels. In the last three months have you watched any programmes in te reo Māori or any programmes that include aspects of Māori culture, perspectives or society? These programmes could be in English or te reo.  
 Base: n = 2016 | 2017 | 2018 | 2019: Māori General Population: n = 600 | 633 | 603 | 603 | 2012; 2019: (n = F,S,R,N): n = (n = 256, 399, 303, 54)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# Among Māori Youth, TV One is also the most common mainstream channel for viewing Māori programming

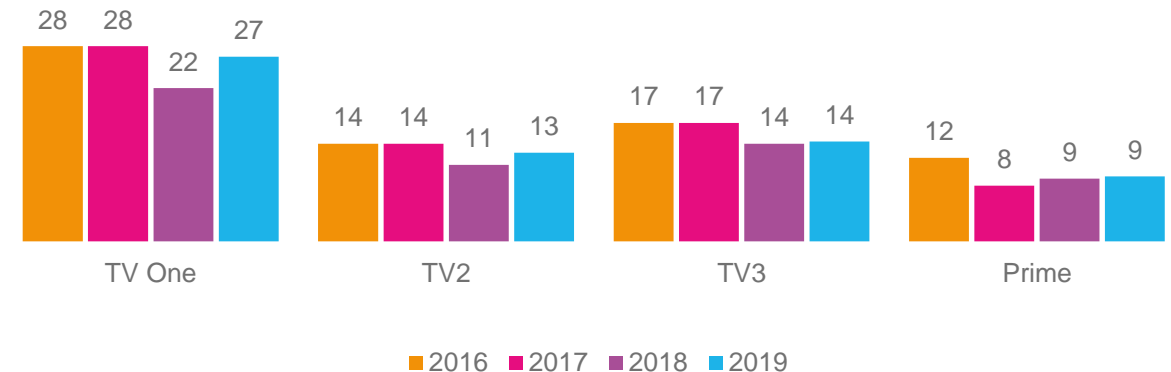
## Key findings

- Among Māori Youth, TV One remains the most common mainstream channel for viewing Māori programming at 27% and at a similar level to 2016 and 2017 after decreasing in 2018
- Claimed viewership of Māori programming is similarly matched for TV3 (at 14%) and TV2 (at 13%), being slightly lower for Prime (at 9%)

Watched (2018): <sup>(1)</sup>	Fluent Speakers	Second Language	Receptive Audience <sup>(1)</sup>	Non Receptive
TV One	39 ▲	30	20 ▼	14
TV2	16	14	10	10
TV3	21 ▲	13	14	8
Prime	12	12	6 ▼	6

## Mainstream channels used for viewing Māori programming – Māori Youth

(%)



Source: I am now going to ask you some questions about your viewing habits for Māori programmes across the other television channels. In the last three months have you watched any programmes in te reo Māori or any programmes that include aspects of Māori culture, perspectives or society? These programmes could be in English or te reo.

Base: n = 2016 | 2017 | 2018 | 2019: Māori Youth: n = 332 | 341 | 361 | 472; 2019: (n = F,S,R,N): (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

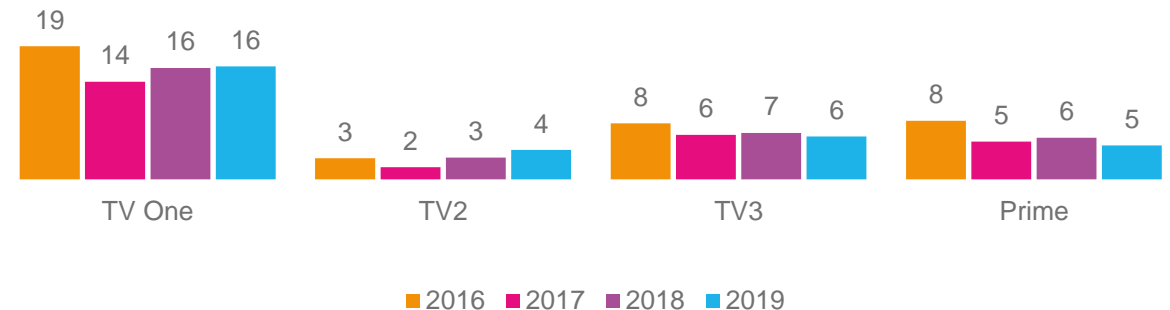
# Among the Rest of NZ Population, TV One is the most popular channel to view Māori programming among mainstream channels

## Key findings

- Among the Rest of NZ Population, claimed viewing of Māori programming is highest for TV One at 16% and similar to past years
- Claimed viewing remains stable for TV2, TV3 and Prime at between 4% to 6% for each

## Mainstream channels used for viewing Māori programming – Rest of NZ Population

(%)



Source: I am now going to ask you some questions about your viewing habits for Māori programmes across the other television channels. In the last three months have you watched any programmes in te reo Māori or any programmes that include aspects of Māori culture, perspectives or society? These programmes could be in English or te reo.  
 Base: n = 2016 | 2017 | 2018 | 2019: Rest of NZ Population: n = 400 | 570 | 600 | 1500

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

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Iwi radio

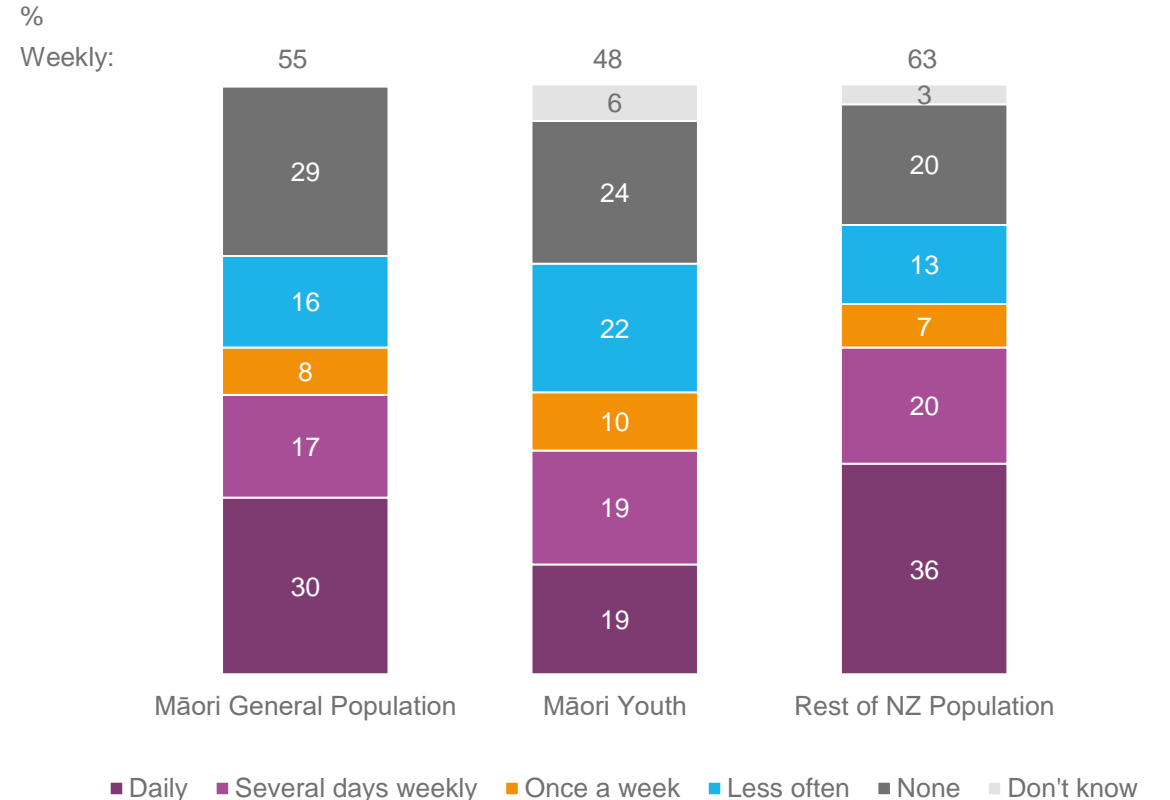
# Daily listening to radio programming in general is less common among Māori Youth than among the Māori General Population

## Key findings

- Just over half within the Māori General Population (55%), one in two Māori Youth and 63% of the Rest of NZ Population listen to radio programming in general on a weekly basis

Listen at least weekly (2019)	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	62 ▲	56	50 ▼	47
Māori Youth	50	52	43	46

## Listening to radio programming in general over the last 3 months (2019)



Source: Over the last three months, how often have you listened to radio programming in general? This could be either via the radio or via the internet.

Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500 | (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# Many within the Māori General Population and Māori Youth continue to report being unaware of any specific iwi radio stations

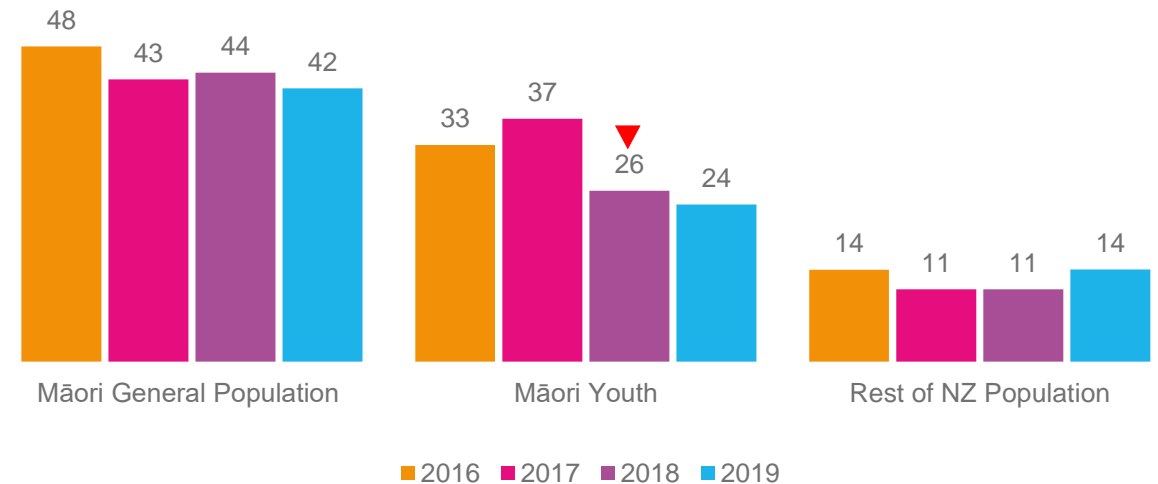
## Key findings

- Claimed awareness of at least one specific iwi radio station is stable at 42% within the Māori General Population
- Claimed awareness is able stable among Māori Youth at 24% (Note: Question wording was updated in 2018 to specify that George FM, Flava and Mai FM are not iwi radio stations)
- Awareness remains significantly higher among Fluent Speakers and is lowest among the Non Receptive Audience within both the Māori General Population and Māori Youth

2019	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	68 ▲	43	23 ▼	11 ▼
Māori Youth	45 ▲	25	15 ▼	10 ▼

## Aware of any specific iwi radio stations

(%)



Source: The following questions are about iwi radio stations. These are radio stations which are operated by iwi to promote Māori language and culture. Please note that George FM, Flava, Mai FM and Sun FM are not iwi radio stations. Are you aware of any specific iwi radio stations?  
 Base: n = 2016 | 2017 | 2018 | 2019: Māori General Population: n = 600 | 633 | 603 | 1012; Māori Youth: n = 332 | 341 | 361 | 372; Rest of NZ Population: n = 400 | 570 | 600 | 1500;  
 (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

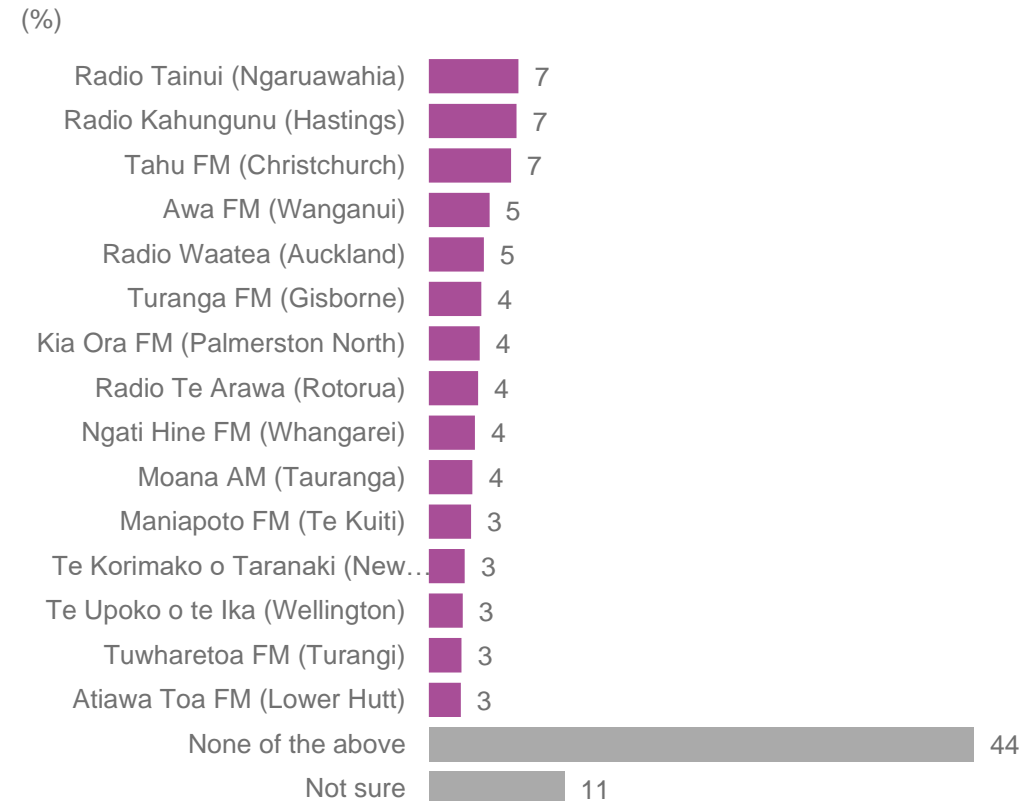


# On prompting, 45% of Māori Youth are currently aware of at least one iwi radio station by name or location

## Key findings

- A wide range of iwi radio stations are recalled, most commonly being Radio Tainui, Radio Kahungunu and Tahu FM

## Prompted awareness of iwi radio stations – Māori Youth 2019 (those with 3% or higher)



Source: Which of the following iwi radio stations, if any, are you aware of? Please note that you could be aware of either the name of the iwi radio station or that a radio station operated by iwi within that location.  
Base: Māori Youth (online): n = 200

# Awareness is stable among the Māori General Population and Māori Youth for whether the iwi with which they most identify with operates a radio station, but is lower than 2016 and 2017

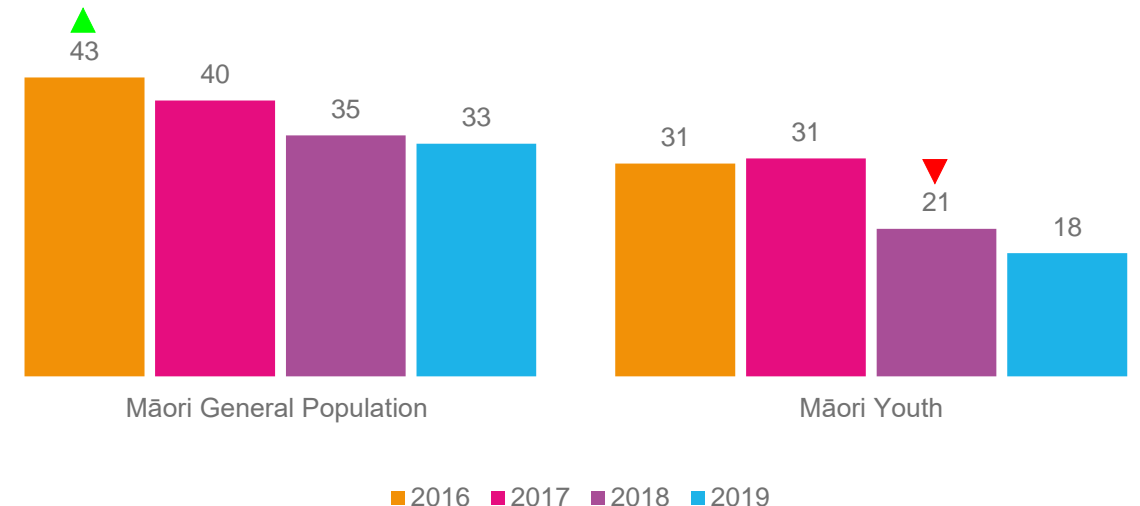
## Key findings

- Among the Māori General Population, 33% are aware of the iwi with which they most closely identify operating a radio station
  - Although at a similar level to 2018, there has been a gradual slow decline in awareness over recent years
- Among Māori Youth, awareness remains stable at 18% after decreasing from 31% in 2017 to 21% in 2018
- Awareness is highest among Fluent Speakers followed by 2nd Language Learners within both the Māori General Population and Māori Youth

2019	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	61 ▲	30	18 ▼	11 ▼
Māori Youth	34 ▲	20	11 ▼	5 ▼

## Awareness if iwi identify with operates a radio station

(%)



Source: Do you know if the iwi with which you most closely identify operates a radio station?

Base: n = 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012; Māori Youth: n = 32 | 341 | 361 | 472; (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

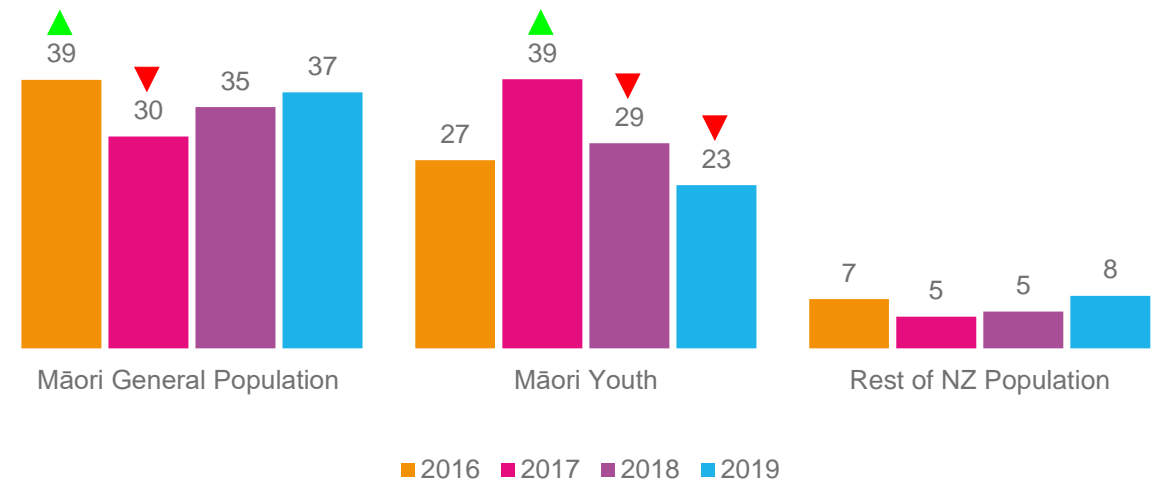
# Listening to iwi radio in the last 12 months is stable among the Māori General Population but has decreased among Māori Youth

## Key findings

- Just under two in five within the Māori General Population (37%) have listened to iwi radio in the last 12 months being a similar level to 2018
- Listening has decreased among Māori Youth to 23%, the lowest level in recent years
- Among the Rest of NZ Population, levels are stable and low at 8%

## Listened to iwi radio in the last 12 months

(%)



Source: Have you listened to an iwi radio station within the last year? This could be either via a radio or via the internet.

Please note that George FM, Flava, Mai FM and Sun FM are not iwi radio stations..

Base: n = 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012; Māori Youth: n = 32 | 341 | 361 | 472; Rest of NZ Population: n = 400 | 570 | 600 | 1500

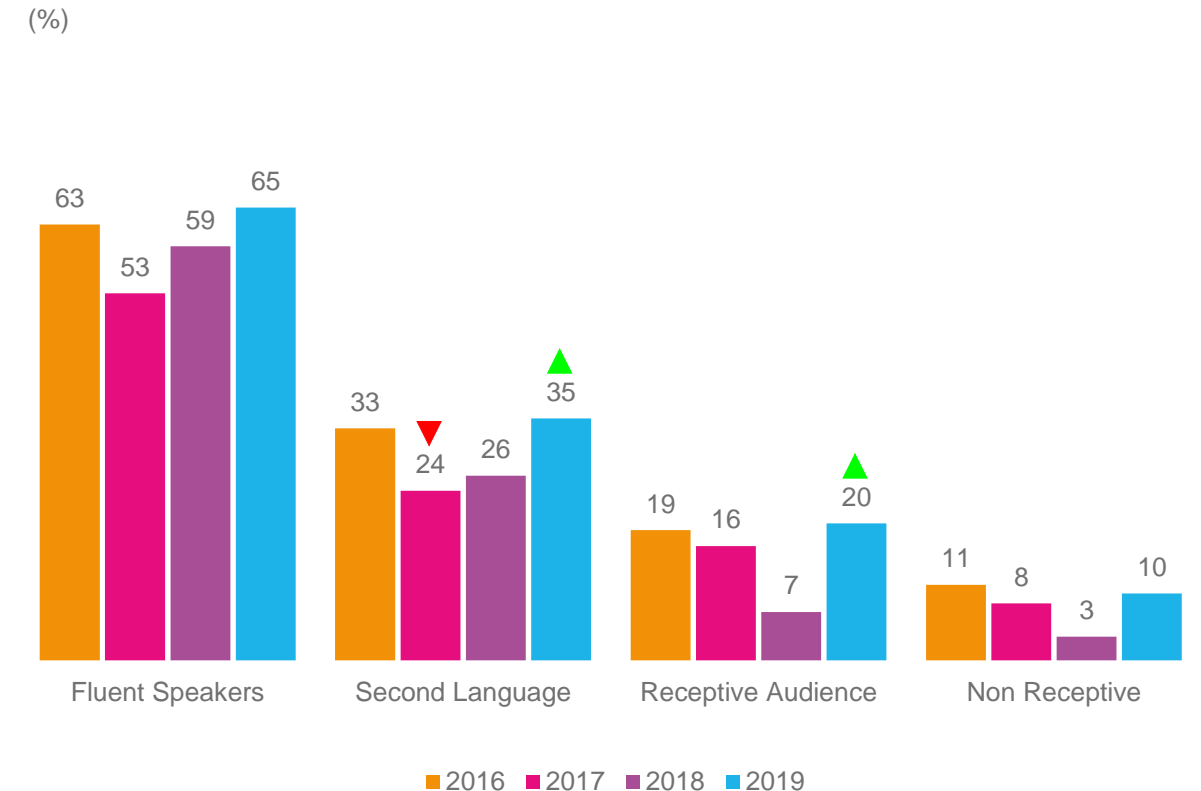
▲ ▼ Significantly higher / lower than previous year at 95% C.L.

# With the Māori General Population, listening to iwi radio in the last 12 months has increased among both 2<sup>nd</sup> Language Learners and the Receptive Audience

## Key findings

- Within the Māori General Population, Fluent Speakers remain most likely to have listened to iwi radio in the last 12 months at almost two in three
- After lower levels in the past two years, there has been an increase among Second Language Learners to 2016 levels with 35% having listened to iwi radio in the past year
- Levels are also heightened among both the Receptive Audience (at 20%) and the Non-Receptive Audience (at 10%)

## Listened to iwi radio in the last 12 months by FSRN group – Māori General Population



Source: Have you listened to an iwi radio station within the last year? This could be either via a radio or via the internet. Please note that George FM, Flava, Mai FM and Sun FM are not iwi radio stations.  
 Base: Māori General Population (n = F,S,R,N): 2016 (n = 184, 291, 76, 49) | 2017 (n = 181, 332, 81, 39) | 2018 (n = 201, 314, 59, 29) | 2019 (n = 256, 399, 303, 54)

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

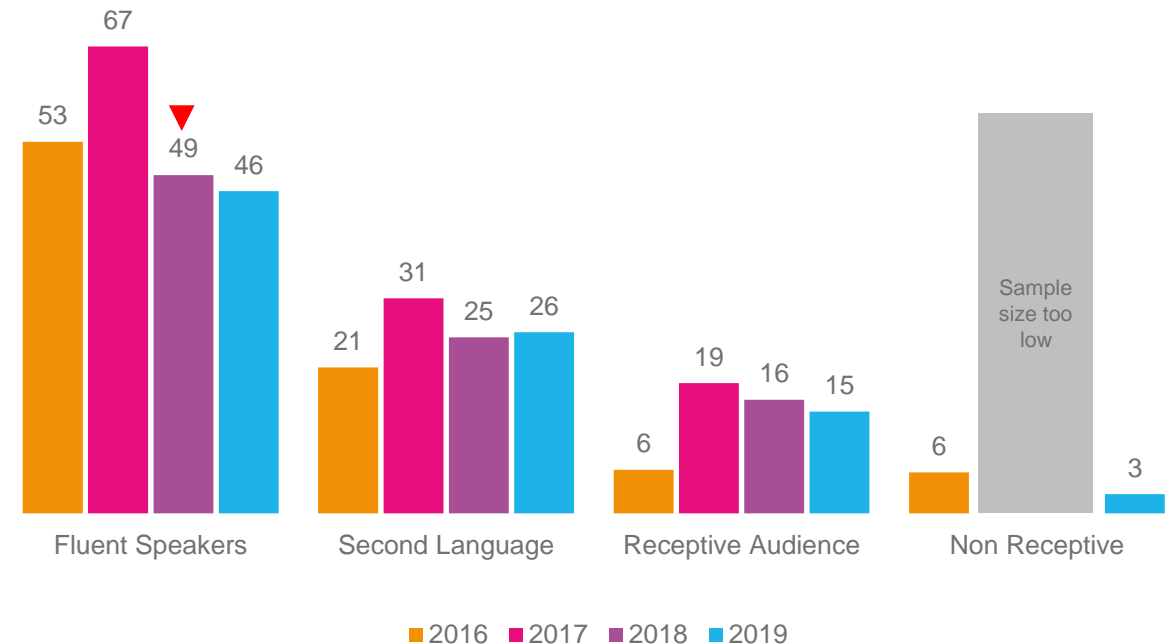
# Fluent Speakers are also the most likely to have listened to iwi radio among Māori Youth

## Key findings

- Among Māori Youth, Fluent Speakers are most likely to have listened to iwi radio in the past 12 months at just under one in two
- One in four 2<sup>nd</sup> Language Learners have listened to iwi radio in the past 12 months, almost half the level seen among Fluent Speakers
- Listening remains stable, but low, among the Receptive Audience at 15% and the Non-Receptive Audience at 3%

## Listened to iwi radio in the last 12 months by FSRN group – Māori Youth

(%)



Source: Have you listened to an iwi radio station within the last year? This could be either via a radio or via the internet.

Please note that George FM, Flava, Mai FM and Sun FM are not iwi radio stations..

Base: Māori Youth (n = F,S,R,N): 2016 (n = 88, 177, 36, 31) | 2017 (n = 95, 184, 44, 18) | 2018 (n = 91, 204, 53, 13) | 2019 (87, 178, 173, 34)

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

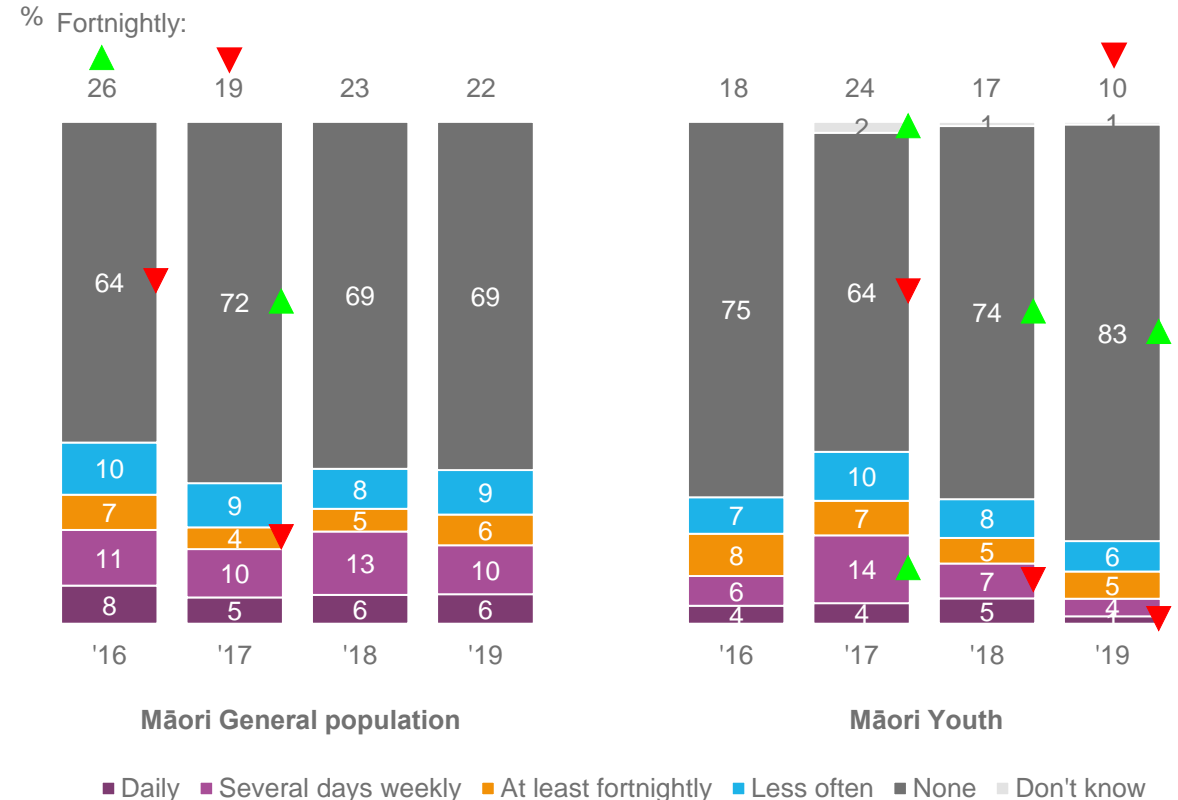
# Regular listening (several days weekly) is stable among the Māori General Population but has decreased among Māori Youth to under half the level in 2018

## Key findings

- Among the Māori General Population, regular listening to iwi radio (several days weekly) remains similar to past years at 16% while a further 6% listen at least fortnightly
- Among Māori Youth, regular listening (several days weekly) has decreased from 12% in 2018 to 5% in 2019 with a further 5% listening at least fortnightly
- Fluent Speakers are most likely to listen to iwi radio at least fortnightly among both audiences
  - This level has decreased from 32% in 2018 to 24% in 2019 among Fluent Speakers within Māori Youth

Listen at least fortnightly (2019)	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	47 ▲	18 ▼	8 ▼	4 ▼
Māori Youth	24 ▲	12	5 ▼	0 ▼

## Frequency listen to iwi radio in the last 3 months – Māori General Population and Māori Youth



Source: Over the last three months, how often have you listened to an iwi radio station? This could be either via the radio or via the internet.

Base: n = 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012; Māori Youth: n = 32 | 341 | 361 | 472; (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

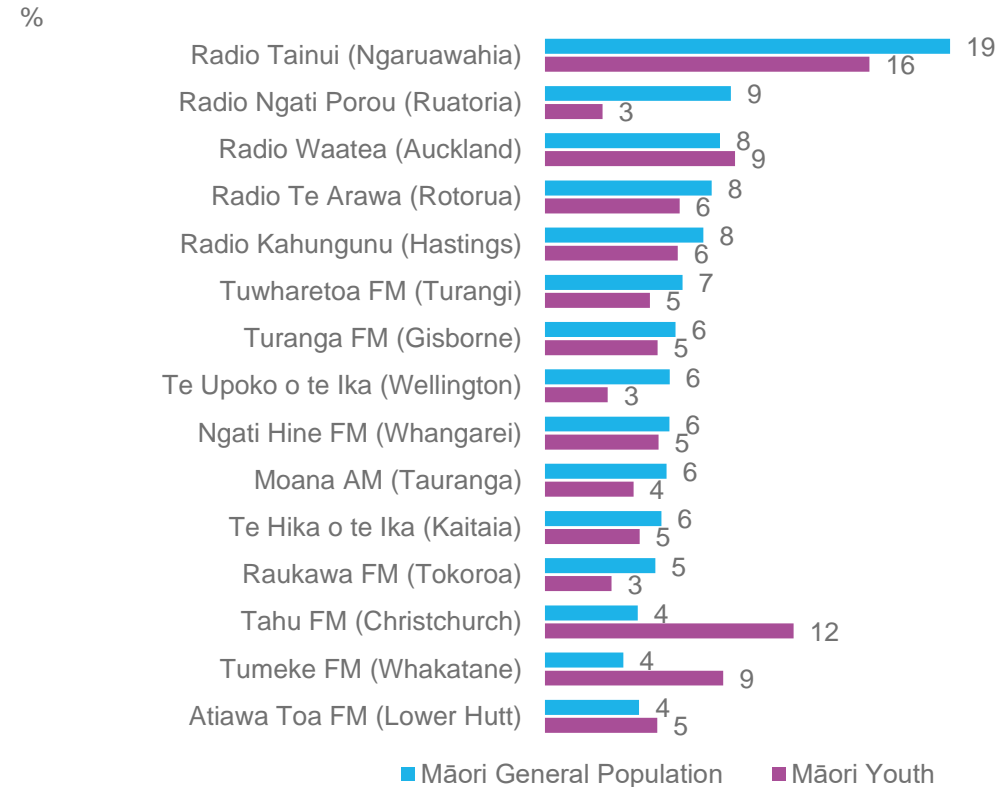
▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# A wide range of iwi radio stations are accessed by the Māori General Population and Māori Youth however Radio Tainui is the most prominent among both groups

## Key findings

- Both the Māori General Population and Māori Youth have listened to a broad range of iwi radio stations within the last 12 months
- The most prominent iwi radio station among both audiences is Radio Tainui

## Main iwi stations listened to – among listeners in the past 12 months (2019 – 5% or higher)



Source: What iwi radio stations have you listened to in the last 12 months?

Base: Listeners to iwi radio in last 12 months, 2019: Māori General Population n = 366, Māori Youth n = 117

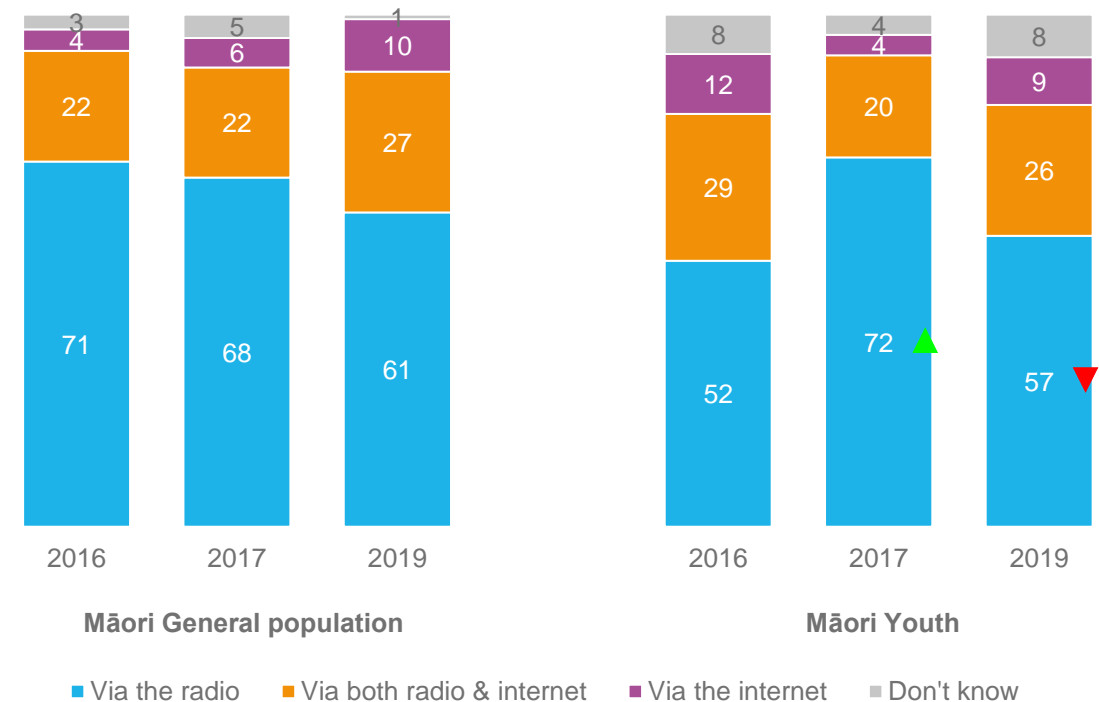
# Radio is most common for accessing iwi radio but almost two in five also listen to iwi radio via the internet

## Key findings

- Although the Māori General Population most commonly listens to iwi radio via the radio, the internet is also increasingly used by 37% in 2019 compared to 28% in 2017
- Similarly, 35% of Māori Youth use the internet to access iwi radio although via radio remains most common

## Way usually listen to iwi radio – among listeners in the past 12 months

(%)



Source: Do you usually listen to iwi radio stations via the radio, via the internet or a combination of both?  
 Base: Listeners to iwi radio in last 12 months, 2016 | 2017 | 2019 Māori General Population: 228 | 193 | 332; Māori Youth: 64 | 122 | 99

▲ ▼ Significantly higher / lower than previous year at 95% C.L.



# There is minimal dissatisfaction with iwi radio among listeners although there is opportunity to improve more moderate ratings among 30%

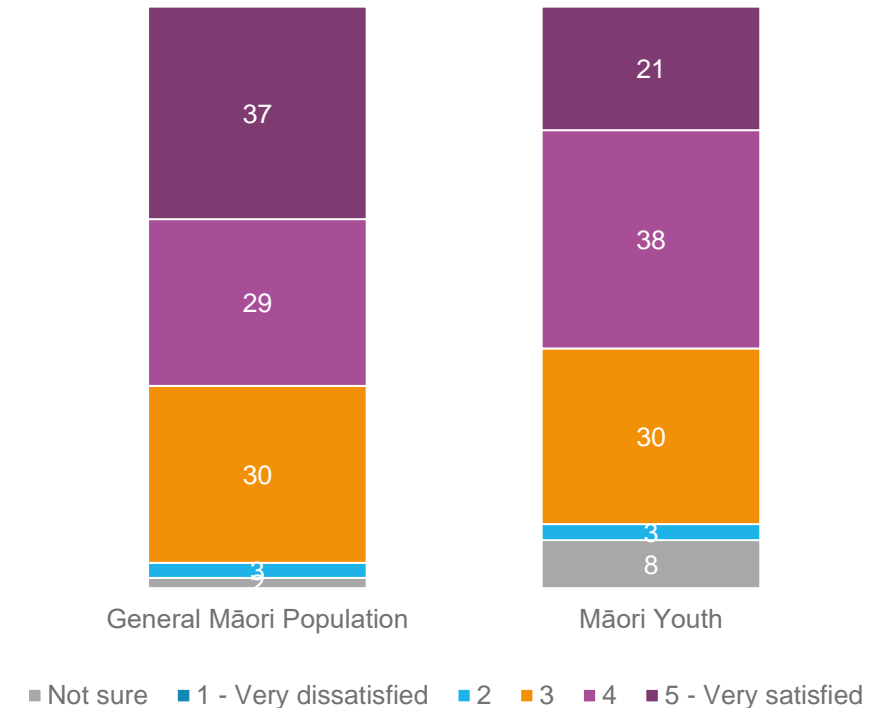
## Key findings

- Among listeners, there is very little dissatisfaction with Māori radio programming at 3% among both the Māori General Population and Māori Youth (rated 1 or 2)
- The Māori General Population are however more likely to be very satisfied (rated 5) at 37% than Māori Youth at 21%

Rated 3 to 5 - 2019	Fluent Speakers	Second Language	Receptive Audience
Māori General Population	95	97	93
Māori Youth	89	84	Sample size too small

## Satisfaction with Māori radio programming in general – among listeners in the past 12 months (2019)

(%)



Source: How satisfied or dissatisfied are you with Māori radio programming in general, on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied?

Base: Listeners to iwi radio in last 12 months, Māori General Population n = 332 | Māori Youth n = 99; (F, S, R) Māori General Population (n = 157, 124, 47), Māori Youth (n = 35, 43, 21)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

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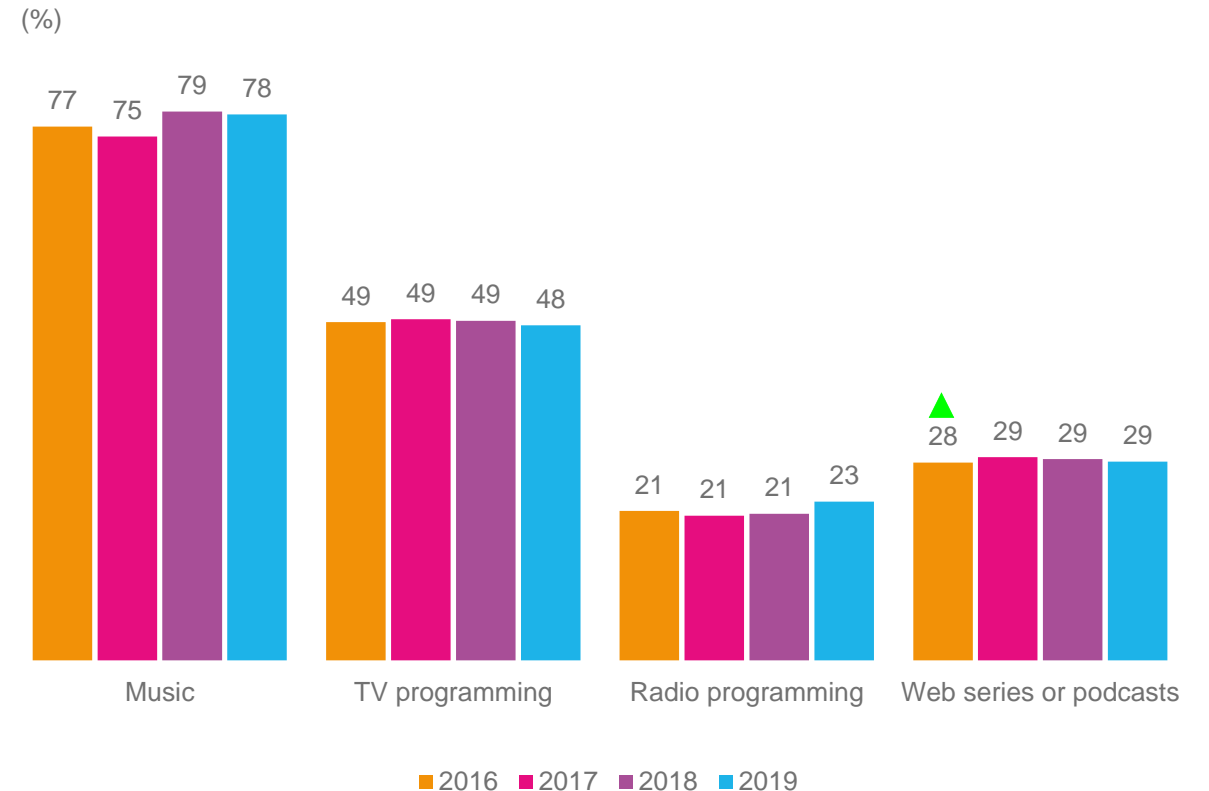
## Digital media

# Accessing general content via digital media is stable among the Māori General Population

## Key findings

- Within the Māori General Population, music consumption via either the internet or saved on devices remains the most commonly accessed digital media at 78%
- Accessing television programming via the internet continues to be stable at 48% and radio programming at 23%
- Accessing web series or podcasts is also stable at 29%

## General content accessed via digital media – Māori General Population



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV.

Which of the following do you regularly do?

Base: 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012

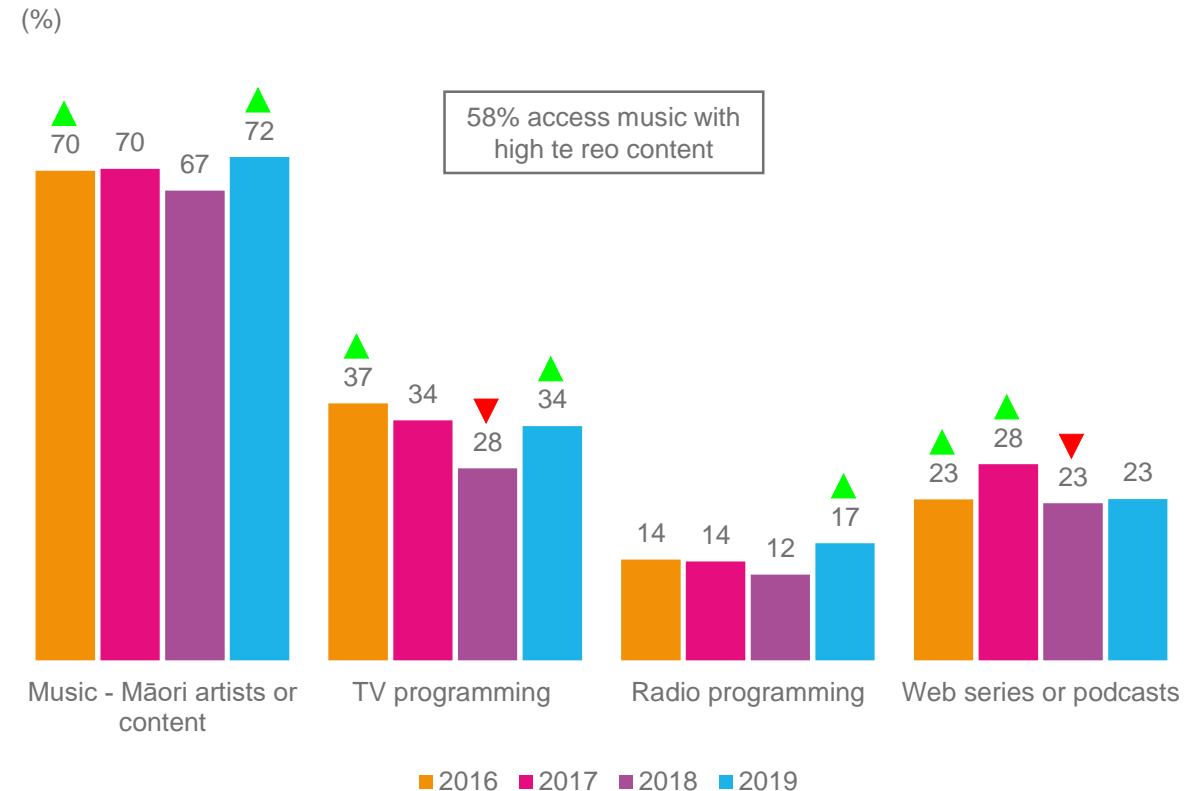
▲ ▼ Significantly higher / lower than previous year at 95% C.L.

# After decreasing in 2018, accessing Māori television programming via the internet is back to previous levels among the Māori General Population and radio programming is heightened

## Key findings

- Accessing digital music by Māori artists or with Māori content remains stable at 72% among the Māori General Population while 58% have accessed music with high te reo content, up from 52% in 2018
- After decreasing to 28% in 2018, accessing Māori television programming via the internet has returned to 34%
- There has been an increase in accessing Māori radio programming via the internet to 17% while accessing Māori web series or podcasts remains stable at 23%

## Māori content accessed via digital media – Māori General Population



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV.

Which of the following do you regularly do?

Base: 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012

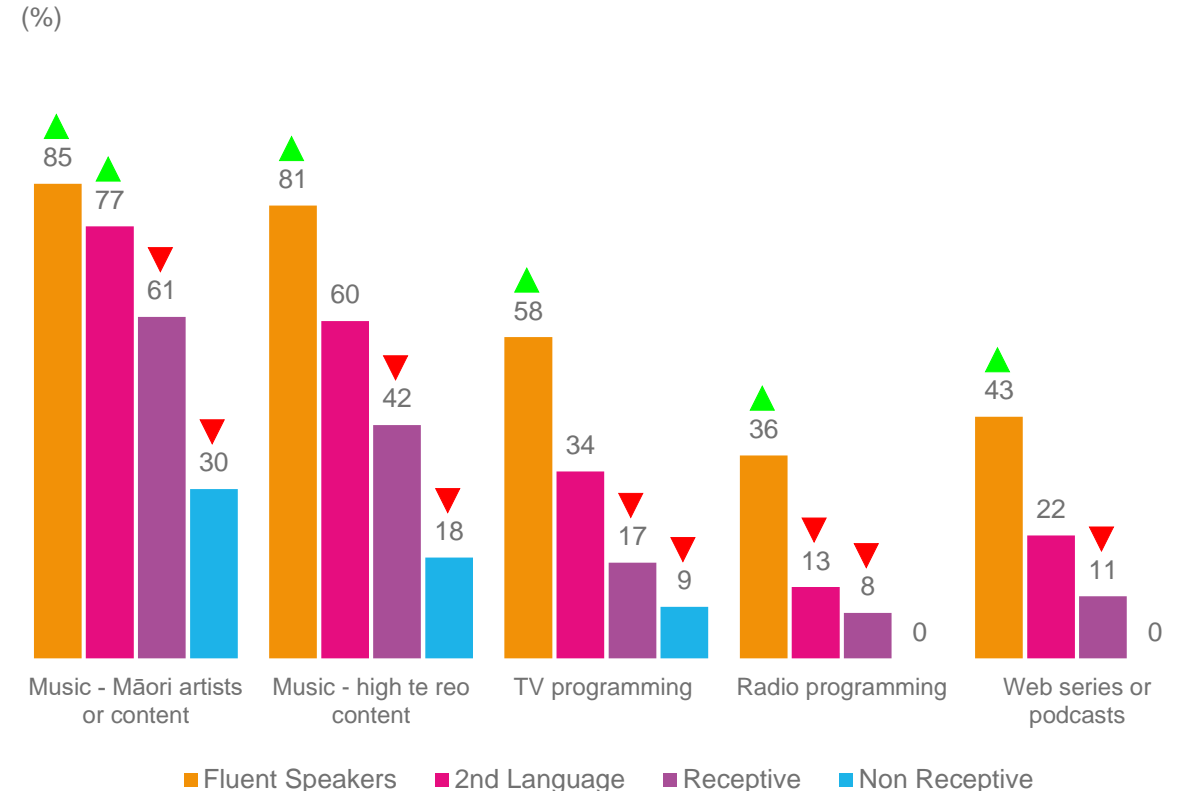
▲ ▼ Significantly higher / lower than previous year at 95% C.L.

# Māori content via digital media is most commonly being accessed by Fluent Speakers within the Māori General Population followed by Second Language Learners

## Key findings

- Music consumption via either the internet or saved on devices is high among Fluent Speakers, Second Language Learners and the Receptive Audience while being more moderate among the Non-Receptive Audience
- Accessing television programming with Māori content via the internet is stable among Fluent Speakers while increasing among Second Language Learners (from 19% to 34%) and the Receptive Audience (from 10% to 17%)
- The increase in accessing radio programming with Māori content via the internet has been among both Fluent Speakers (from 27% to 36%) and Second Language Learners (from 5% to 13%)
- Accessing web series or podcasts with Māori content is stable among most groups but increasing among Second Language Learners (from 15% to 22%)

## Māori content accessed via digital media by FSR group – Māori General Population (2019)



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV. Which of the following do you regularly do?

Base: Fluent Speakers n = 256 | 2nd language learners n = 399 | Receptive n = 303 | Non Receptive n = 54

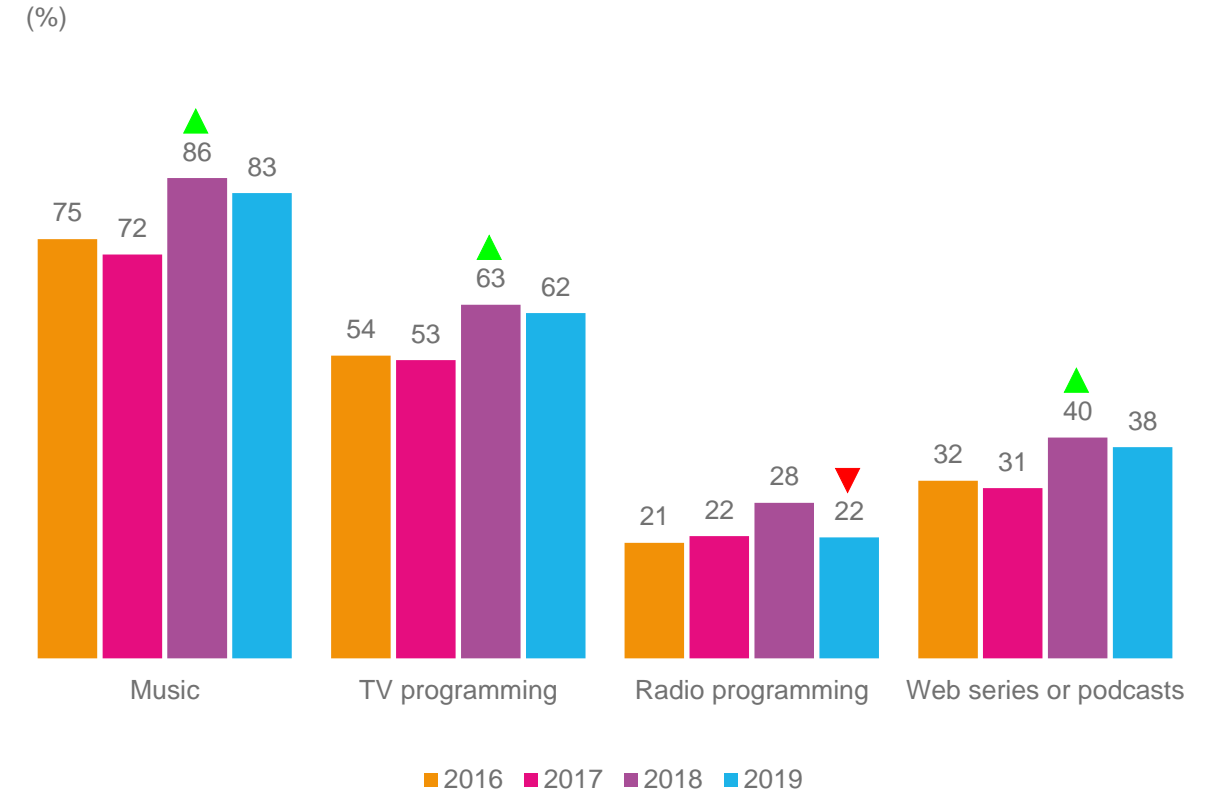
▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

# With the exception of radio programming, accessing general content via digital media is stable among Māori Youth and often ahead of the Māori General Population

## Key findings

- Māori Youth continue to most commonly use digital media for music consumption, remaining stable at 83% after increasing in 2018
- Accessing television programming via the internet is also stable this year at 62% after increasing in 2018 and remains ahead of the Māori General Population (at 48%)
- Using the internet to access radio programming has returned to 22% after increasing to 28% in 2018
- Two in five Māori Youth continue to access web series or podcasts with this level also ahead of the Māori General Population (at 29%)

## General content accessed via digital media – Māori Youth



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV.

Which of the following do you regularly do?

Base: 2016 | 2017 | 2018 } 2019: Māori Youth: n = 32 | 341 | 361 | 472

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

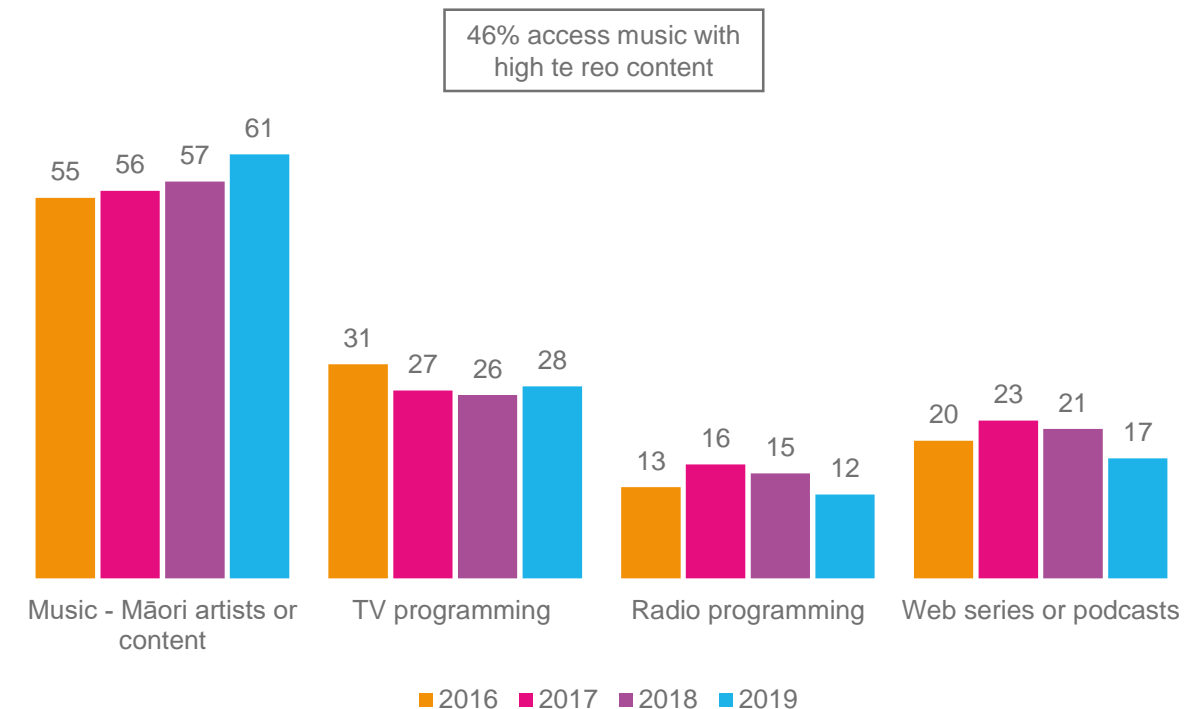
# Despite the high access to general content, accessing digital media with Māori content among Māori Youth remains lower than among the Māori General Population

## Key findings

- Three in five Māori Youth are now accessing music with Māori artists or Māori content via the internet or saved on devices and many also access music with high te reo content (46%)
- Using the internet to access television programming with Māori TV content remains stable at 28% but slightly behind the Māori General Population (at 34%)
- Although not statistically significant, accessing radio programming with Māori content is lower than in recent years at 12% and web series or podcasts at 17%

## Māori content accessed via digital media – Māori Youth

(%)



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV.

Which of the following do you regularly do?

Base: 2016 | 2017 | 2018 } 2019: Māori Youth: n = 32 | 341 | 361 | 472

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

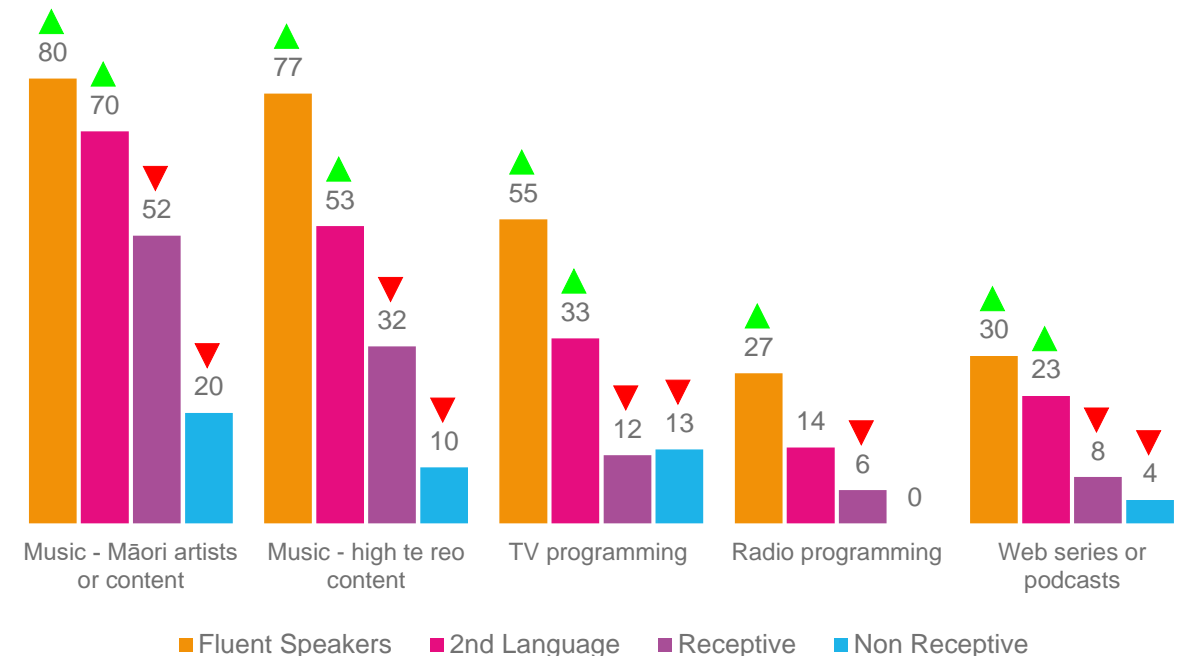
# Māori content via digital media is most commonly being accessed by Fluent Speakers within Māori Youth followed by Second Language Learners

## Key findings

- Although most common among Fluent Speakers, access of music with Māori artists or Māori content via the internet or saved on devices is also high among Second Language Learners and the Receptive Audience, while being more moderate among the Non-Receptive Audience
- Access of Māori Television programming via the internet is stable at 55% among Fluent Speakers while increasing among Second Language Learners from 19% in 2018 to 33%
- Among Māori Youth, access of Māori radio programming via the internet remains most common among Fluent Speakers at 27%
- 30% of Fluent Speakers currently access Māori content via web series or podcasts, being down from 41% in 2018, while access has increased among Second Language Learners from 15% to 23%

## Māori content accessed via digital media by FSR group – Māori Youth (2019)

(%)



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV. Which of the following do you regularly do?

Base: Fluent Speakers n = 87 | 2nd Language Learners n = 178 | Receptive n = 173 | Non Receptive n = 34

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

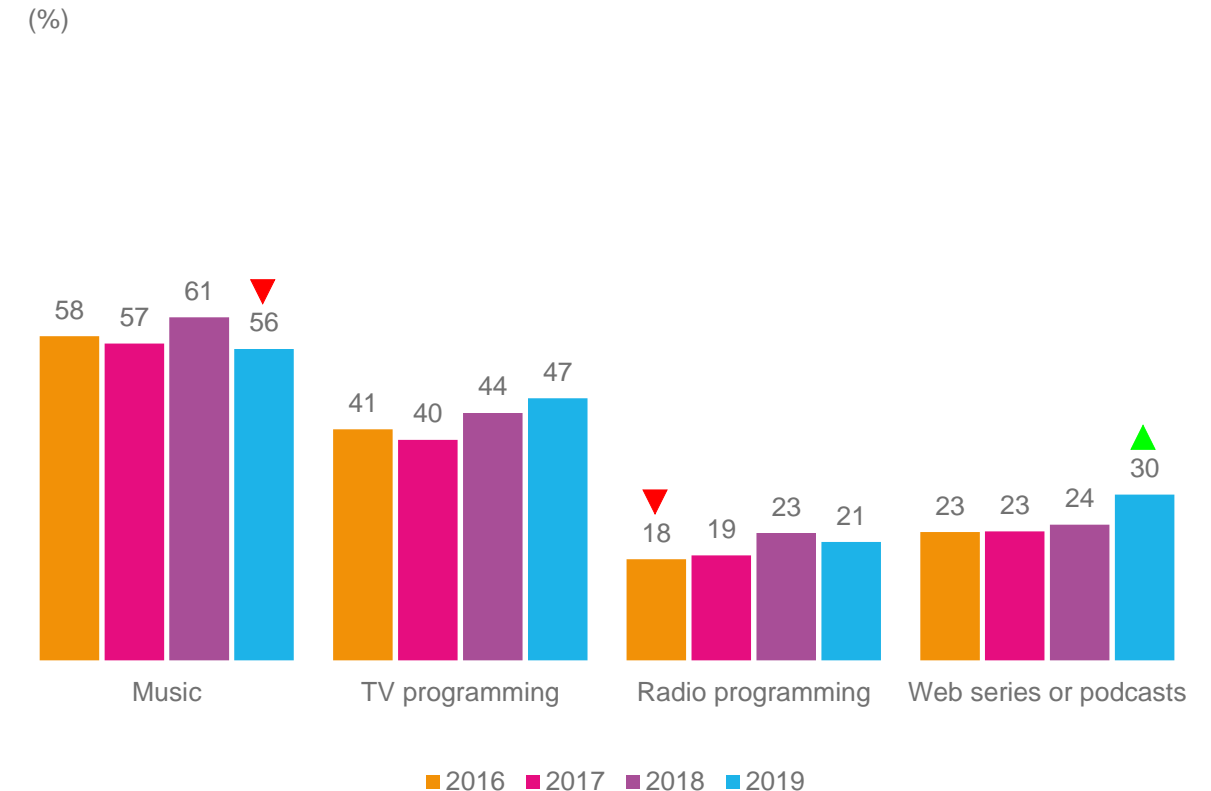


# The Rest of NZ Population accesses general content via digital media at a similar level to the Māori General Population with the exception of music which is lower

## Key findings

- The Rest of NZ Population continues to most commonly access music via digital media, although being slightly lower than in 2018 at 56% and behind the level within the Māori General Population and Māori Youth
- Accessing television programming via the internet continues to slowly trend upwards and is currently 47%
- Accessing radio programming via the internet is stable at 21% while access of web series or podcasts has increased from 24% to 30%

## General content accessed via digital media – Rest of NZ Population



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV.

Which of the following do you regularly do?

Base: 2016 | 2017 | 2018 } 2019: Rest of NZ Population: n = 400 | 570 | 600 | 1500

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

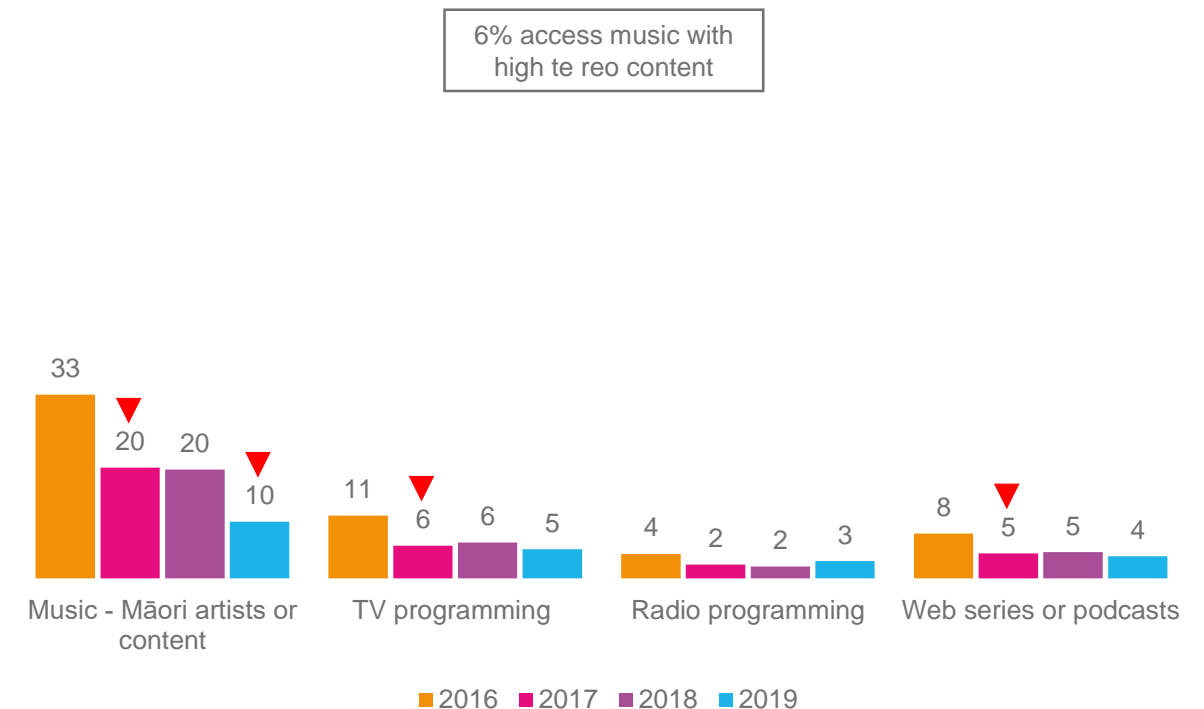
# There is only low consumption of Māori content via the internet among the Rest of NZ Population

## Key findings

- Among the Rest of NZ Population, listening to music from Māori artists or with Māori content either via the internet or saved on devices has halved from 20% in 2018 to 10% in 2019
- Only low numbers of the Rest of NZ Population access television programming (5%), radio programming (3%) and web series or podcasts (4%) with Māori content via the internet

## Māori content accessed via digital media – Rest of NZ Population

(%)



Source: The following question is about programming accessed via the internet including on demand and YouTube and via any device including laptops, tablets, mobile phones and Smart TV.

Which of the following do you regularly do?

Base: 2016 | 2017 | 2018 } 2019: Rest of NZ Population: n = 400 | 570 | 600 | 1500

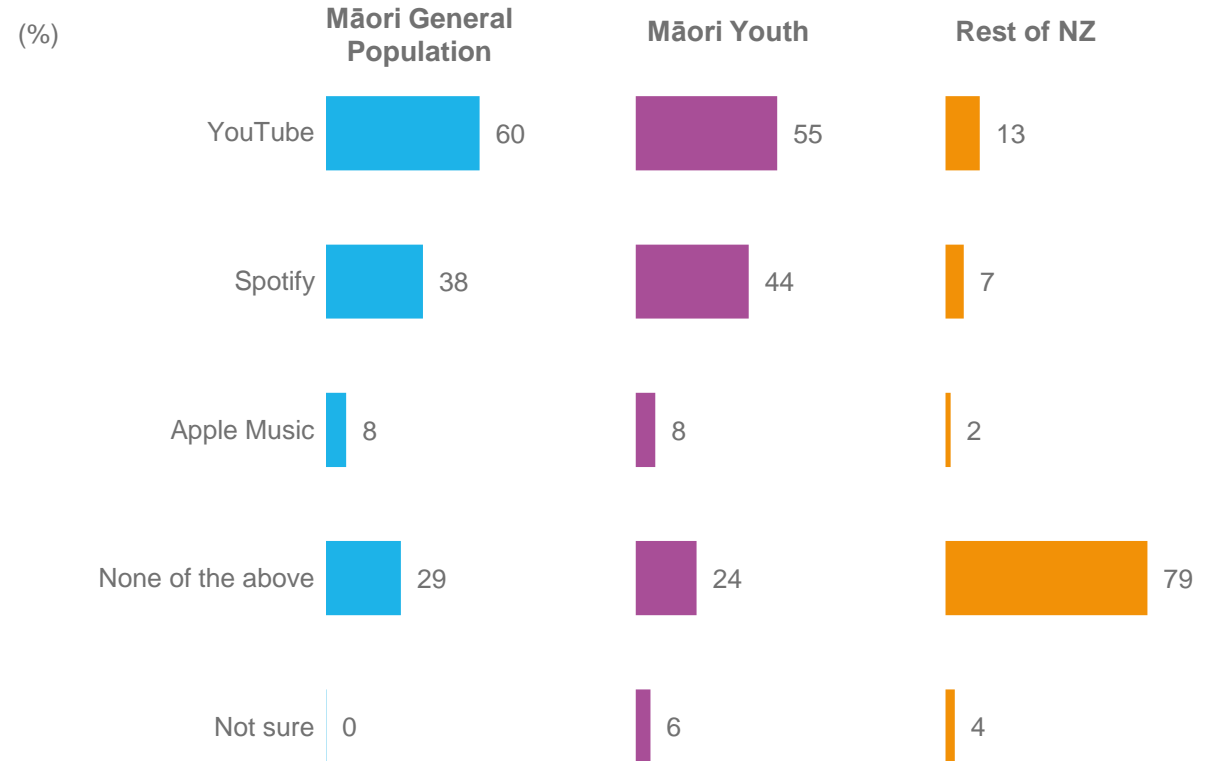
▲ ▼ Significantly higher / lower than previous year at 95% C.L.

# YouTube is the most common means to access digital Māori music followed by Spotify

## Key findings

- The Māori General Population (at 60%) and Māori Youth (at 55%) most commonly access digital Māori music via YouTube
- Around two in five within both groups access Māori music via Spotify with Apple Music less common at 8%

## Ways regularly access digital Māori music



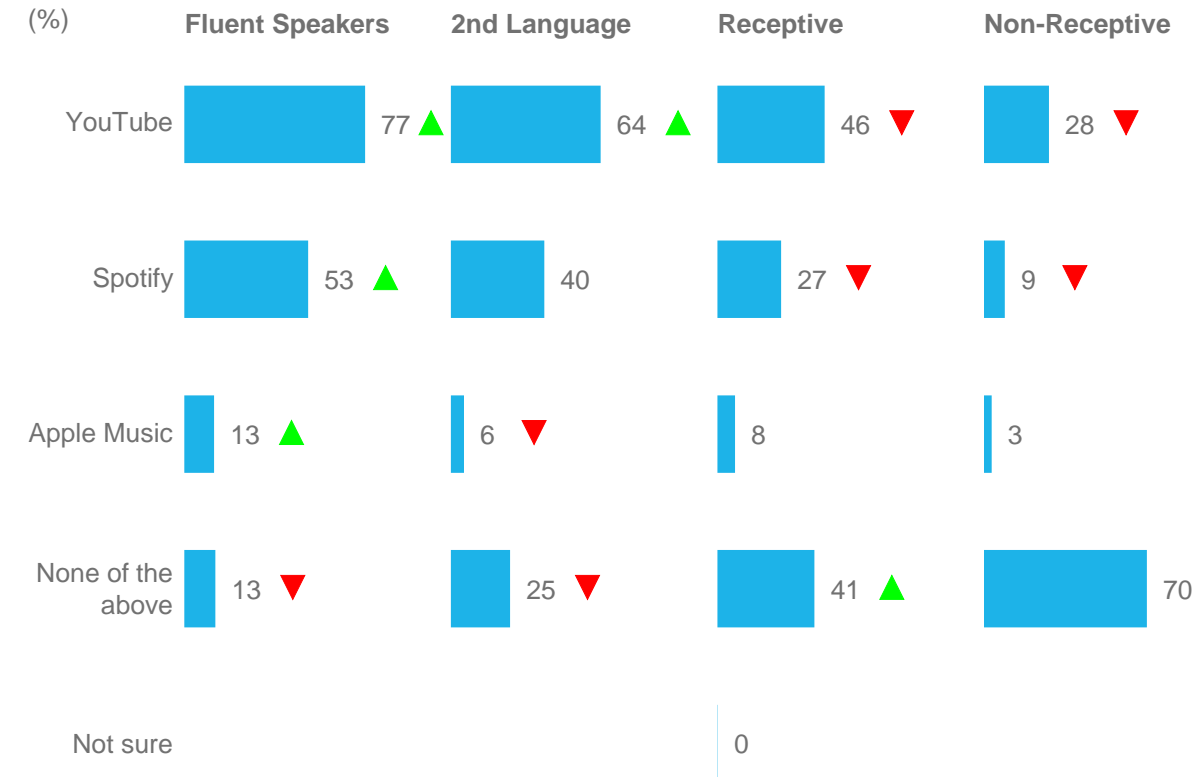
Source: Do you regularly access Māori music via any of the following?  
Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500

# Although most commonly accessing digital Māori music via YouTube, many Fluent Speakers and Second Language Learners within the Māori General Population also use Spotify

## Key findings

- Among the Māori General Population, access of digital Māori music via YouTube is highest among Fluent Speakers (at 77%) and Second Language Learners (at 64%)
- Fluent Speakers are also most likely to access digital Māori music by either Spotify (at 53%) or Apple Music (at 13%)
- Two in five Second Language Learners also access digital Māori music via Spotify but less commonly via Apple Music at 6%
- One in two within the Receptive Audience access digital Māori music via YouTube and 27% via Spotify

## Ways regularly access digital Māori music by FSR group – Māori General Population



Source: Do you regularly access Māori music via any of the following?

Base: Fluent Speakers n = 256 | 2nd language learners n = 399 | Receptive n = 303 | Non Receptive n = 54

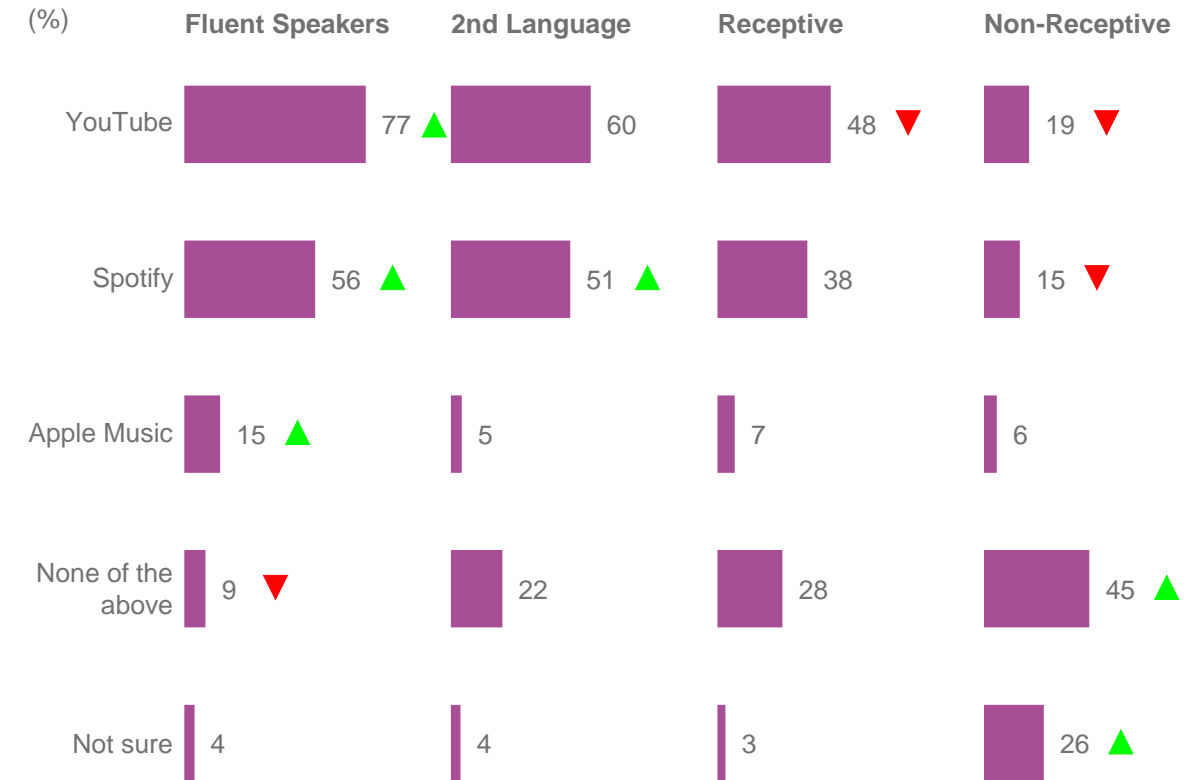
▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

# Among Māori Youth, Fluent Speakers are the most common users of YouTube to access digital Māori music with Spotify similarly used by Fluent Speakers and Second Language Learners

## Key findings

- Among Māori Youth, Fluent Speakers most commonly access digital Māori music via YouTube (at 77%) followed by Second Language Learners (at 60%) and the Receptive Audience (at 48%)
- Use of Spotify to access digital Māori is similar among Fluent Speakers (at 56%) and Second Language Learners (at 51%) but being lower among the Receptive Audience (at 38%)
- Apple Music is most commonly used by Fluent Speakers to access digital Māori music at 15%
- There is only low access of digital Māori music among the Non-Receptive Audience typically via either YouTube or Spotify

## Ways regularly access digital Māori music by FSR group – Māori Youth



Source: Do you regularly access Māori music via any of the following?

Base: Fluent Speakers n = 256 | 2nd Language Learners n = 399 | Receptive n = 303 | Non Receptive n = 54

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

6

## Māori Language – ability, use and impact of broadcasting

# Reported ability to have a conversation in te reo Māori about a lot of everyday things is higher among interviewed Māori General Population and Māori Youth than 2013 Census results

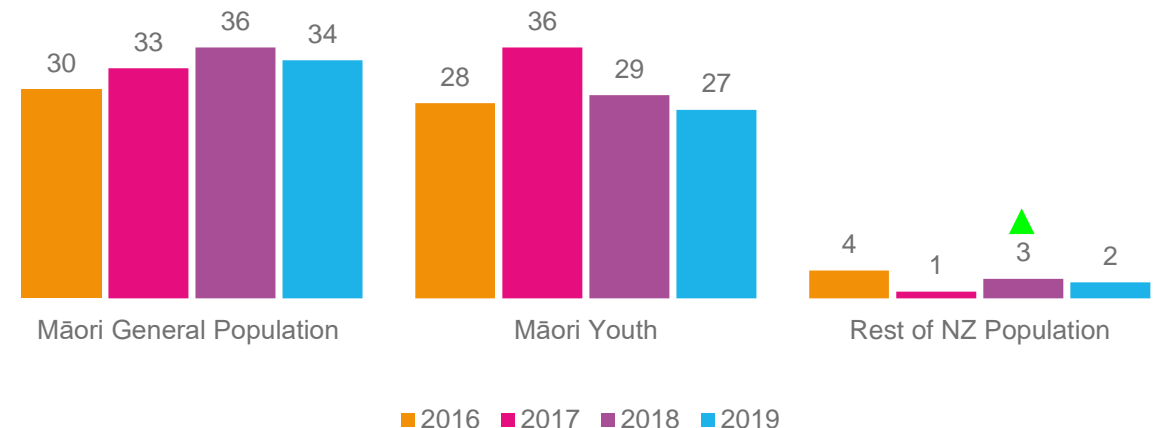
## Key findings

- One in three within the Māori General Population (34%) report being able to have a conversation in te reo Māori about a lot of everyday things
  - This is significantly higher than the 2013 Census result of 23%
- 27% of Māori Youth report being able to have a conversation in te reo Māori which is also higher than the 2013 Census figure of 20%
- Only 2% of the Rest of NZ Population are able to have a conversation in te reo

NZ Census figures (2013):	Māori General population	Māori Youth
Māori	23%	20%
Samoan	1%	1%
NZ sign language	1%	1%
Other	2%	2%

## Languages in which can have a conversation about a lot of everyday things – Te reo Māori

(%)



Source: Which of the following languages could you have a conversation about a lot of everyday things?

Base: n = 2016 | 2017 | 2018 | 2019: Māori General Population: n = 600 | 633 | 603 | 1012; Māori Youth: n = 236 | 341 | 361 | 472; Rest of NZ Population: n = 400 | 570 | 600 | 1500

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

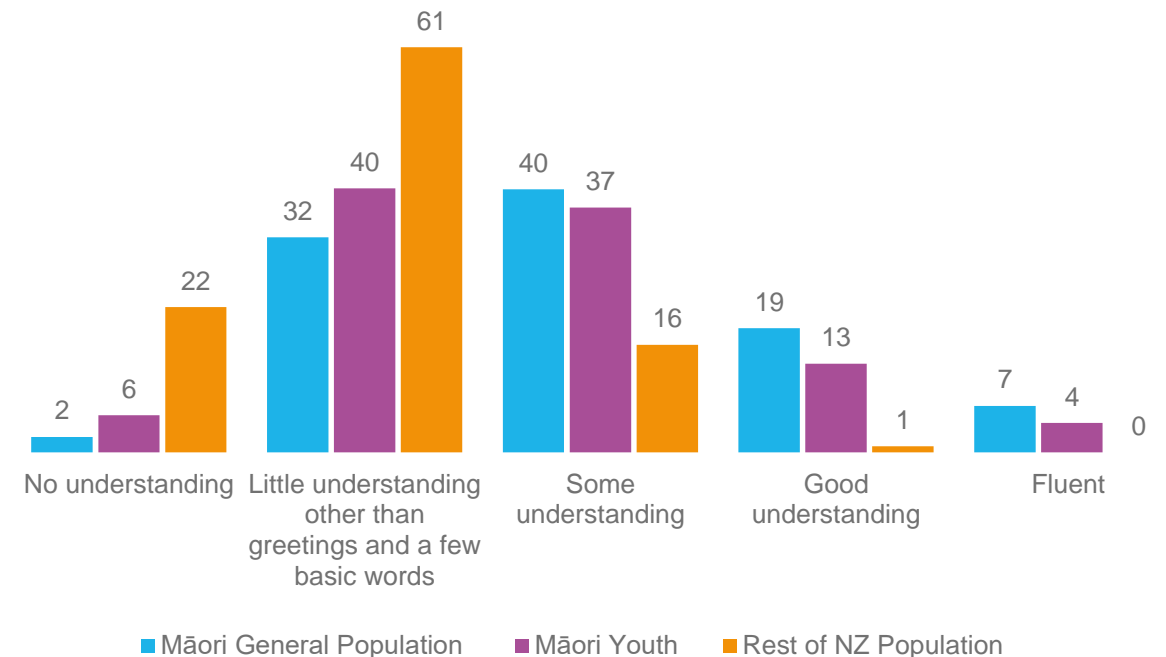
# Three in five within the Māori General Population and half Māori Youth report having at least some understanding of te reo Māori although few consider themselves to be fluent

## Key findings

- Few within the Māori General Population report having no understanding of te reo Māori with many claiming to have little or some understanding
- Overall 26% of the Māori General Population and 17% of Māori Youth report having a good understanding of te reo or being fluent
- Within the Rest of NZ Audience, four in five have either no understanding of te reo Māori or little understanding other than greetings and a few basic words

## Level of te reo Māori in situations feel most confident with ability (2019)

(%)



Source: In situations in which you feel most confident with your ability, which of the following statements best describes your level of te reo Māori, or Māori language?

Base: 2019 Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500

1) Question wording and codes were revised in 2019

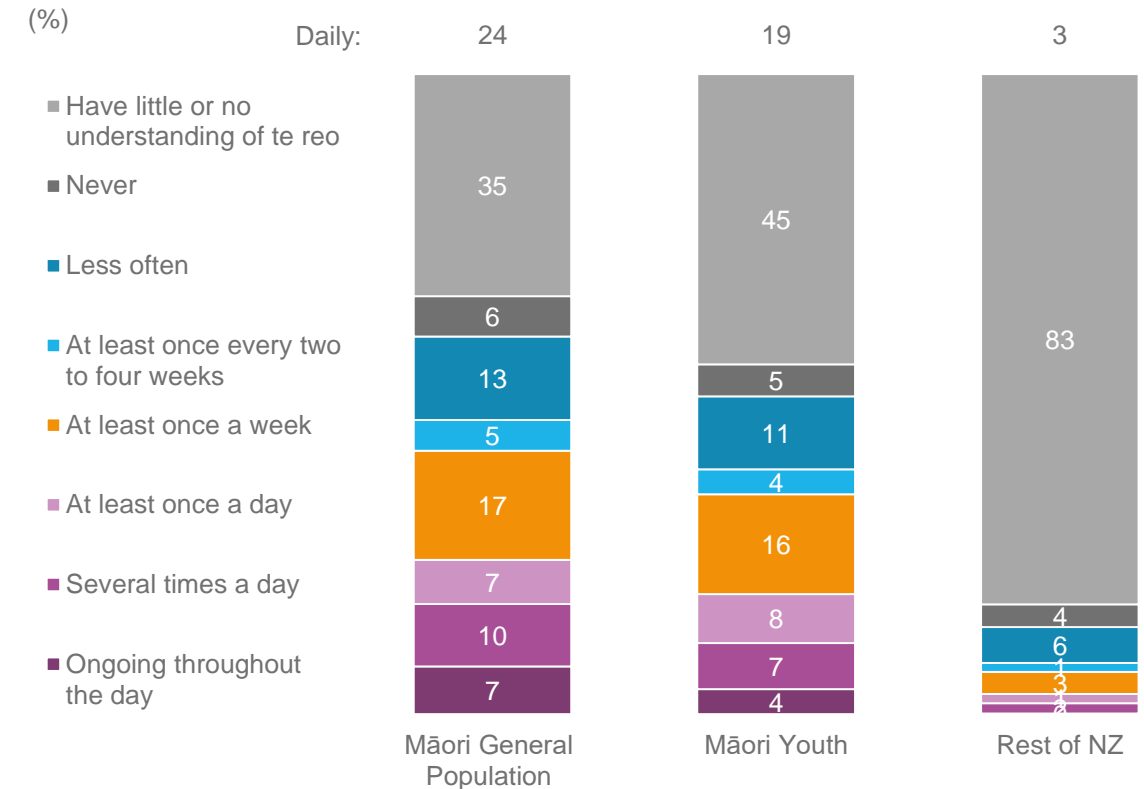


# One in four within the Māori General Population and one in five within Māori Youth engage in conversations in te reo Māori on a daily basis

## Key findings

- One in four (28%) within the Māori General Population report having a conversation in te reo Māori daily although only 7% have ongoing conversations throughout the day
- A further 17% of the Māori General Population have conversations in te reo at least once a week and 5% at least once a month
- Among Māori Youth, one in five (19%) have daily conversations in te reo Māori but only 4% have ongoing conversations throughout the day
- A further 16% of the Māori Youth have conversations in te reo at least once a week and 4% at least once a month
- Overall two in five within the Māori General Population and half Māori Youth never engage in conversations in te reo (Note for some this is due to having little or no understanding)

## Use of te reo Māori for conversations in everyday life (2019)<sup>(1)</sup>



Source: Which of the following best describes how often you have conversations in te reo Māori in your everyday life? Please exclude your use of single words or greetings.

Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500

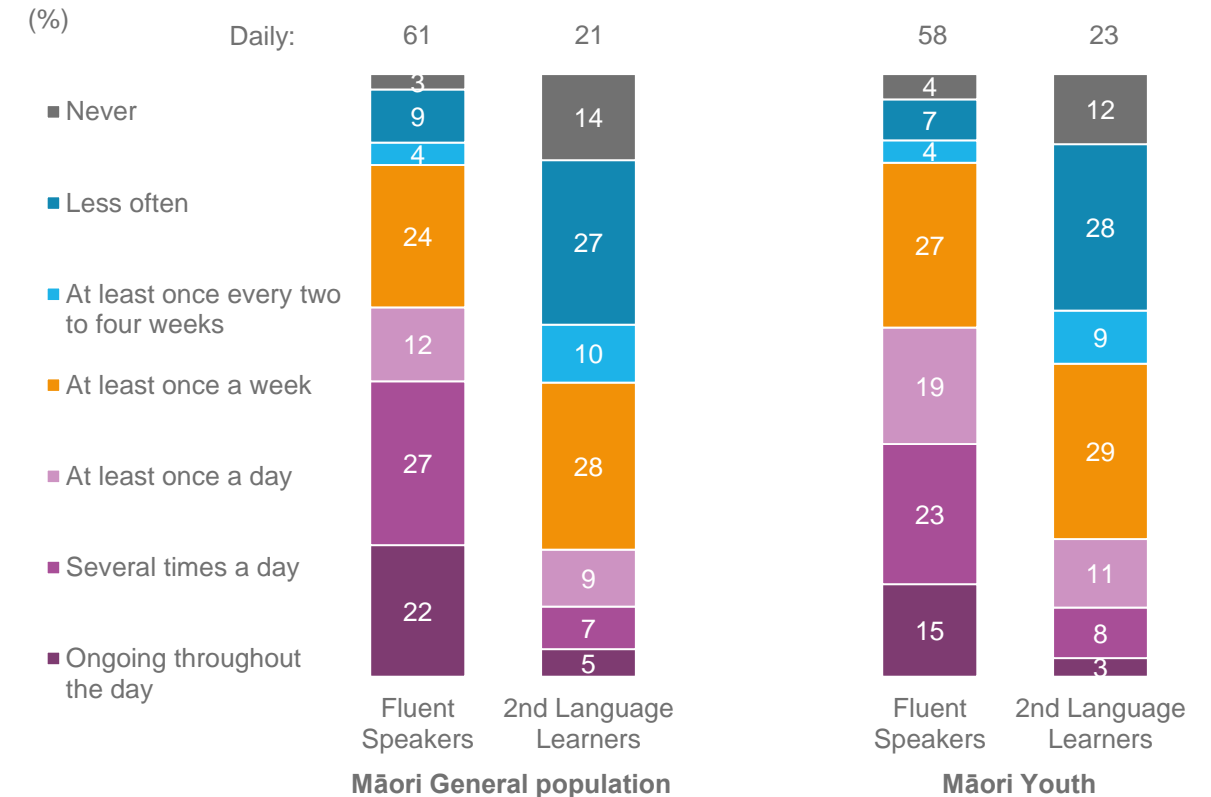
1) Question was asked among those with at least some claimed understanding of te reo

# Three in five Fluent Speakers converse in te reo Māori on a daily basis and one in five Second Language Learners

## Key findings

- Among both the Māori General Population and Māori Youth, three in five Fluent Speakers converse in te reo Māori on a daily basis
- Fluent Speakers within the Māori General Population are most likely to converse in te reo on an ongoing basis (at 22%) than among Māori Youth (at 15%)
- One in five Second Language Learners converse in te reo daily among both the Māori General Population and Māori Youth with a further 28% to 29% conversing at least weekly
- Two in five Second Language Learners within both audience groups however converse in te reo less than monthly or never

## Use of te reo Māori for conversations in everyday life by FSR group (2019) <sup>(1)</sup>



Source: Which of the following best describes how often you have conversations in te reo Māori in your everyday life? Please exclude your use of single words or greetings.

Base: (F, S) Māori General Population (n = 256, 300) | Māori Youth (n = 87, 178)

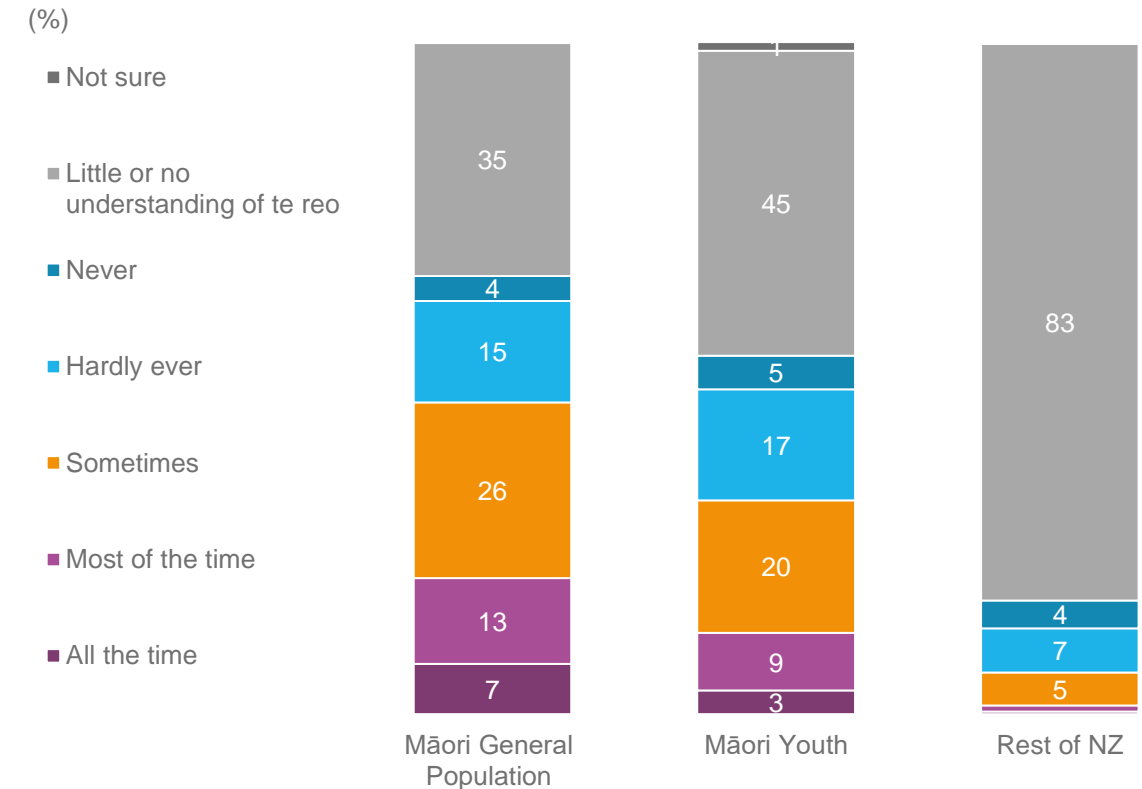
1) Question was asked among those with at least some claimed understanding of te reo

# Only one in five within the Māori General Population and 12% of Māori Youth will typically elect to use te reo rather than another language when given the opportunity and feel confident

## Key findings

- When given the opportunity and feel confident to use te reo, one in five within the Māori General Population will converse in te reo rather than another language either most or all of the time and 12% of Māori Youth
- A further 26% of the Māori General Population and 20% of Māori Youth will sometimes elect to talk in te reo

## Use of te reo rather than another language when have the opportunity and feel confident (2019) <sup>(1)</sup>



Source: How often do you choose to talk in te reo rather than another language when you have the opportunity and feel confident to do so?

Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500

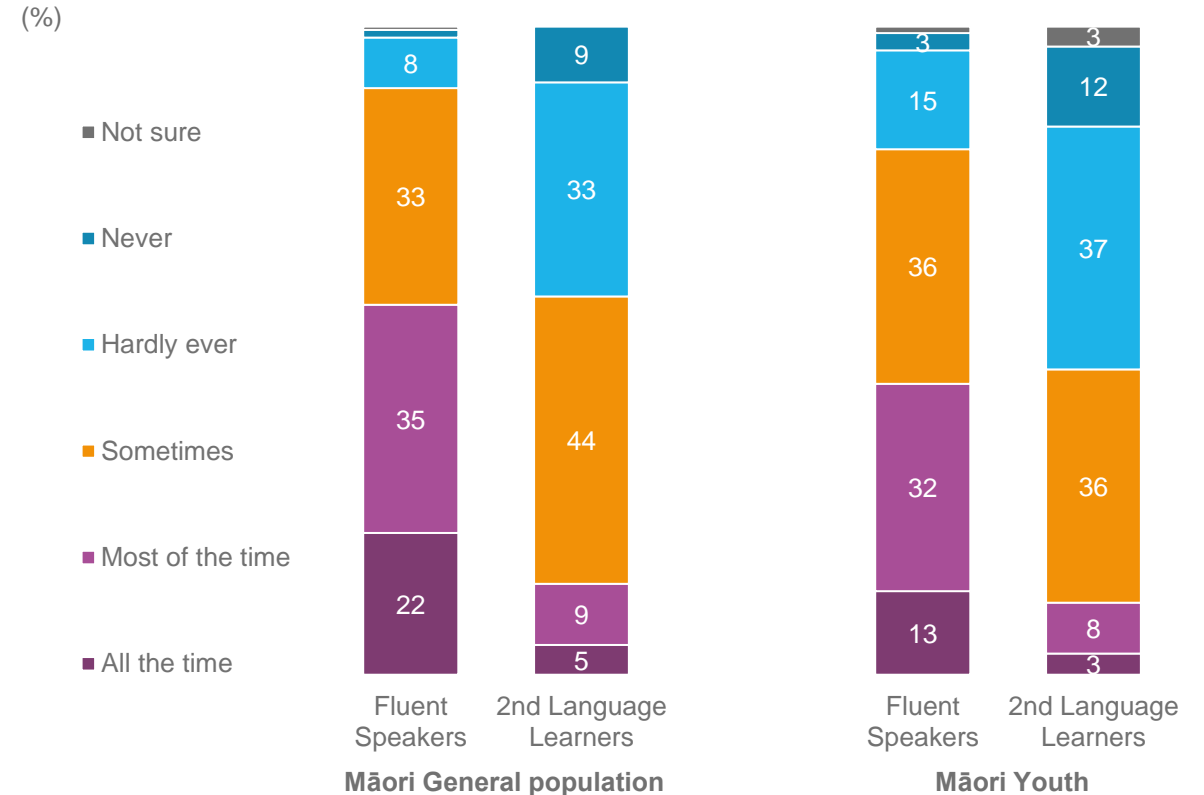
1) Question was asked among those with at least some claimed understanding of te reo

# Although many Fluent Speakers will elect to use te reo when given the opportunity, many will only sometimes do this and few Second Language Learners will use te reo most of the time

## Key findings

- When given the opportunity to use te reo and feel confident to do so, 57% of Fluent Speakers within the Māori General Population will do so either most or all of the time and a further 33% sometimes
- This is lower among Māori Youth with 45% doing so most or all the time and 36% sometimes
- Among Second Language Learners, only 14% within the Māori General Population will use te reo all or most of the time and 11% within Māori Youth
- Although a further 44% of Second Language Learners within the Māori General Population will sometimes use te reo, 42% hardly ever or never do so
- Similarly, among within Māori Youth, although 37% of Second Language Learners will sometimes use te reo, one in two hardly ever or never do so

Use of te reo rather than another language when have the opportunity and feel confident by FSR group (2019) <sup>(1)</sup>



Source: How often do you choose to talk in te reo rather than another language when you have the opportunity and feel confident to do so?.

Base: (F, S) Māori General Population (n = 256, 300) | Māori Youth (n = 87, 178)

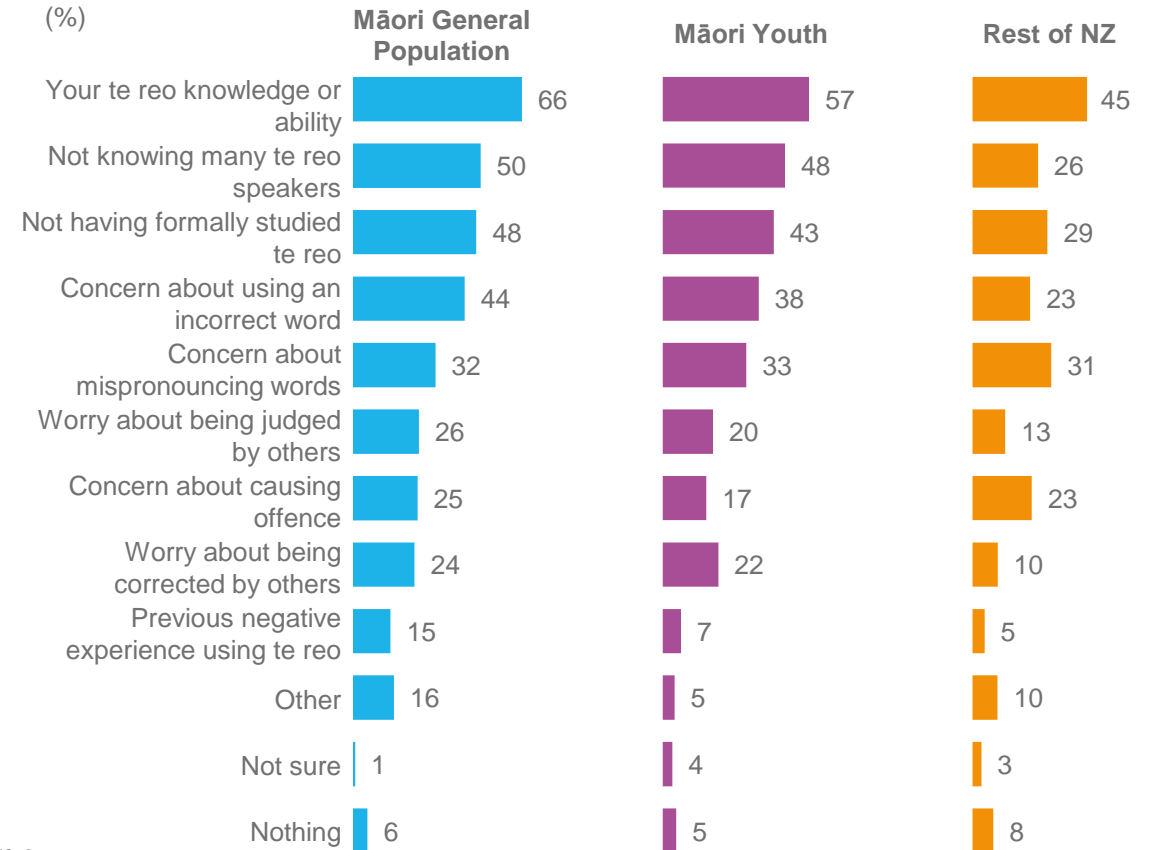
1) Question was asked among those with at least some claimed understanding of te reo

# Although not the most common barriers, underlying concerns with using te reo include mispronunciation, using an incorrect word, being judged by others or causing offense

## Key findings

- The main barrier to using te reo more often in everyday life is te reo knowledge or ability among all audience groups
- Also common among the Māori General Population and Māori Youth are not know many te reo speakers, not formally having studied te reo and concern about using an incorrect word or mispronouncing a word
- Among the Rest of NZ Population, common barriers are also not having formally studied te reo and concern about mispronunciation
- One in four among the Māori General Population and one in five Māori Youth are concerned about being judged or corrected by others or about causing offense
- Similarly 23% of the Rest of NZ Population are concerned about causing offense

## Barriers to using te reo Māori more often in everyday life (2019)



Source: What, if anything, discourages or prevents you from using te reo Māori to communicate more often in your everyday life?  
 Base: Māori General Population n = 989 | Māori Youth n = 448 | Rest of NZ n = 1170

# Among the Māori General Population, not having formally studied te reo, not knowing many speakers and concern about using an incorrect word are common barriers

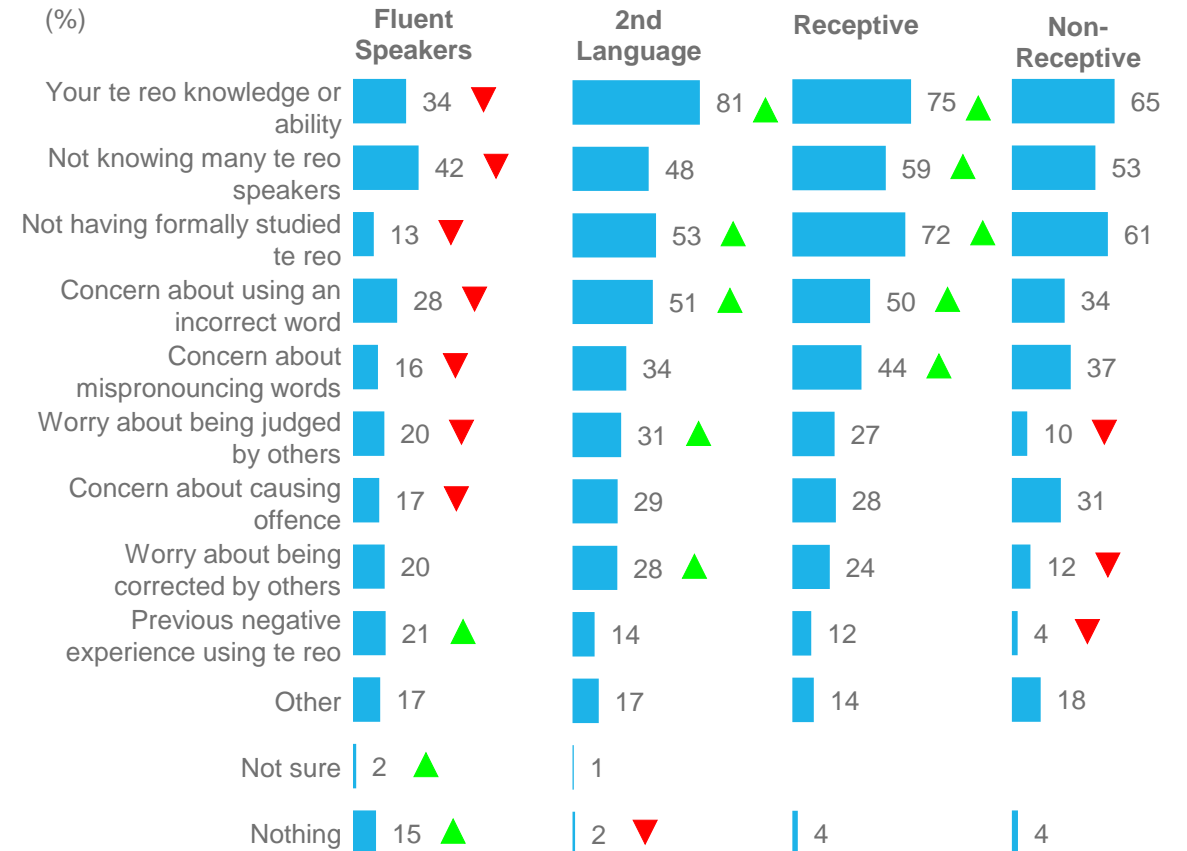
## Key findings

- Among the Māori General Population, Fluent Speakers have fewer barriers to conversing in te reo than other language groups, the most common being not knowing many te reo speakers
- The most common barrier among other language groups is their te reo ability followed by not having formally studied te reo, not knowing many te reo speakers and concern about using an incorrect word
- The Receptive Audience are the most concerned about mispronunciation at 44%
- Second Language Learners and the Receptive Audience have the highest concern about being judged or corrected with the Non-Receptive Audience also concerned about causing offence

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

Source: What, if anything, discourages or prevents you from using te reo Māori to communicate more often in your everyday life?  
 Base: Fluent Speakers n = 256 | 2nd Language Learners n = 399 | Receptive n = 284 | Non Receptive n = 50

## Barriers to using te reo more often in everyday life by FSR group – Māori General Population



# Among Māori Youth, their te reo knowledge and not having formally studied te reo are common barriers among Second Language Learners and the Receptive Audience

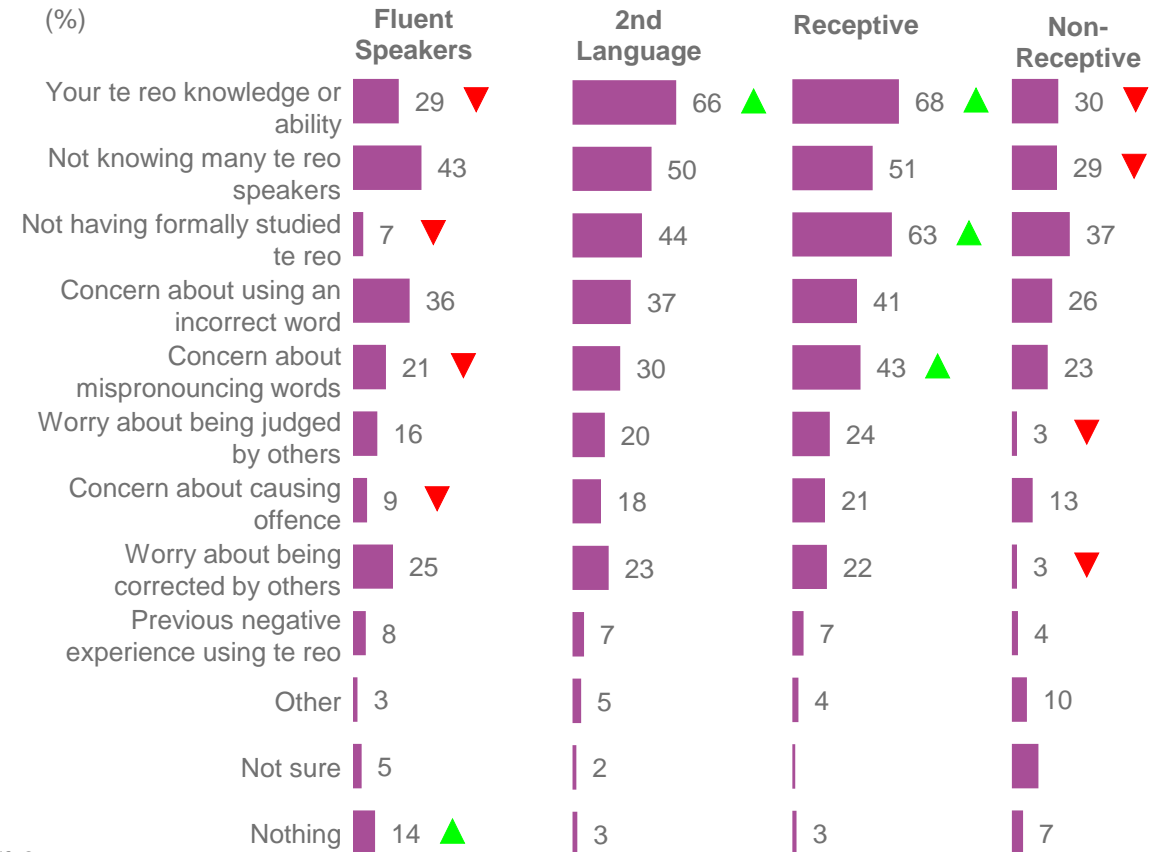
## Key findings

- Among Māori Youth, Fluent Speakers have fewer barriers to conversing in te reo than other language groups, the most common being not knowing many te reo speakers or concern about using an incorrect word
- Among Second Language Learners, the most common barrier is their te reo knowledge and not knowing many te reo speakers
- Their te reo ability is also a main barrier among the Receptive Audience along with not having formally studied te reo
- Concern about either using an incorrect word or mispronouncing words is also common among most groups
- Around one in four Fluent Speakers (25%), Second Language Learners (23%) and Receptive Audience (22%) are concerned about being corrected by others
- Concern about causing offence is most common among Second Language Learners (18%) and the Receptive Audience (21%)

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

Source: What, if anything, discourages or prevents you from using te reo Māori to communicate more often in your everyday life?  
 Base: Fluent Speakers n = 87 | 2nd Language Learners n = 178 | Receptive n = 173 | Non Receptive n = 34

## Barriers to using te reo more often in everyday life by FSR group – Māori Youth



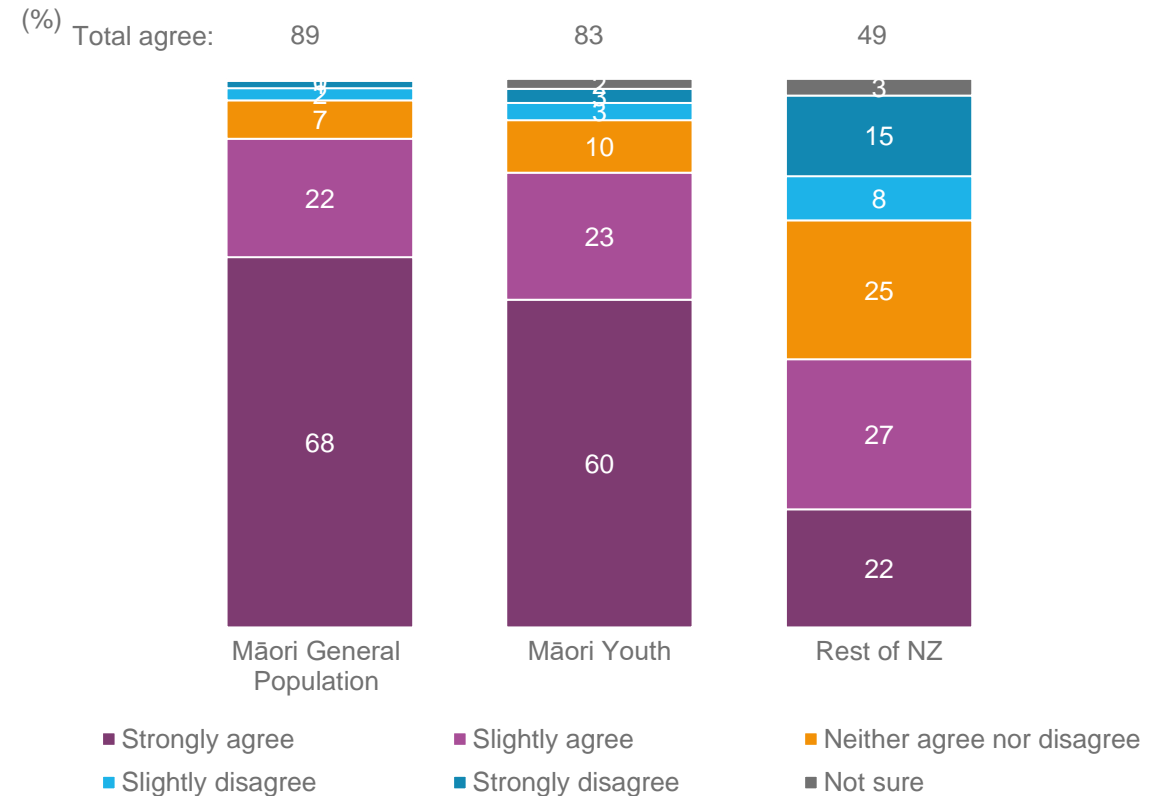
# There is high interest in improving te reo understanding among the Māori General Population and Māori Youth and one in two Rest of NZ Population also express interest

## Key findings

- Nine in ten among the Māori General Population agree that they would like to improve their understanding of te reo and 68% strongly so
- There is also high agreement among Māori Youth, with four in five interested in improving their understanding of te reo and 60% strongly so
- Among the Rest of NZ Population, half would like to improve their te reo understanding and 22% strongly so
- Among the language groups, all within the Receptive Audience and none within Non-Receptive would like to improve, being part of their classification
- Fluent Speakers and Second Language Learners are however most likely to 'strongly agree' that they would like to improve their te reo understanding

Strongly agree:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	75 ▲	77 ▲	60 ▼	0 ▼
Māori Youth	68	67 ▲	62	0 ▼

## Interest in improving understanding of te reo Māori



Source: Do you agree, disagree or neither that you would like to improve your understanding of te reo Māori?  
 Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500; (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.



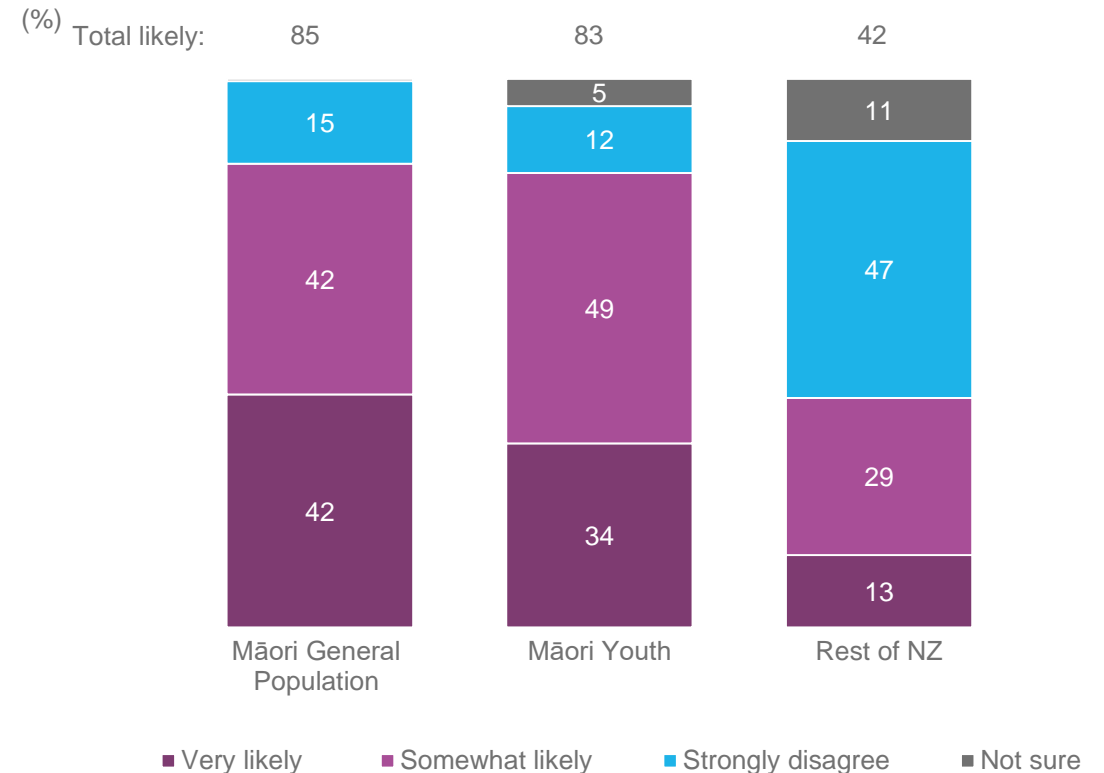
# The majority within the Māori General Population and Māori Youth agree they are at least somewhat likely to take measures to improve their te reo within the next two years

## Key findings

- The majority of the Māori General Population (85%) and Māori Youth (83%) claim to be likely to take measures to improve their te reo understanding within the next two years
- However, being 'very likely' to do this is more moderate at 42% among the Māori General Population and 34% among Māori Youth
- Fluent Speakers and Second Language Learners have higher agreement that they are 'very likely' to take measures to improve while being more moderate among the Receptive Audience who are typically only 'somewhat likely'
- Among the Rest of NZ Population, two in five express likelihood to take measures within the next two years to improve their te reo however only 13% are very likely to do so

Very likely:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	67 ▲	47 ▲	22 ▼	3 ▼
Māori Youth	57 ▲	40 ▲	23 ▼	6 ▼

## Likelihood to take measures to improve te reo Māori understanding within next 2 years



Source: How likely are you to take measures to improve your understanding of te reo Māori within the next two years?  
 Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500; (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

# Māori Television remains effective in providing opportunities to learn te reo Māori with agreement among Māori Youth viewers similar to the Māori General Population

## Key findings

- Four in five Māori Television viewers within the Māori General Population and Māori Youth agree that Māori Television provides more opportunity to learn te reo
- Agreement continues to fluctuate among viewers within the Rest of NZ Population with 57% currently agreeing
- Within the language groups, there is high agreement among Fluent Speakers, Second Language Learners and the Receptive Audience

2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	88 ▲	85	79	48 ▼
Māori Youth	89	84	76	Sample size too small

Source: Do you think any of the following has changed as a result of Māori Television?

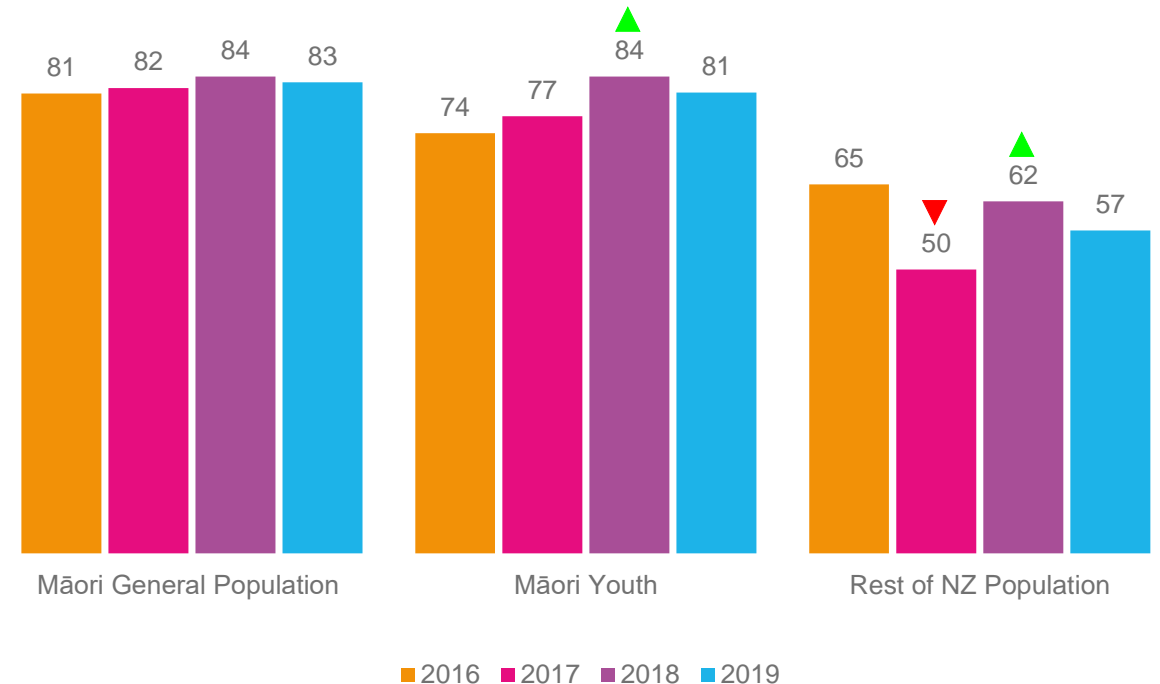
Base: n = 2016 | 2017 | 2018 | 2019; Māori Television viewers: Māori General Population n = 577 | 609 | 577 | 858; Māori Youth n = 327 | 317 | 327 | 316; Rest of NZ Population n = 309 | 443 |

455 | 635 (n = F, S, R,N): Māori General Population 2019 (n = 241, 356, 226, 35); Māori Youth 2018 (n = 73, 138, 97, 8)

1. Caution low base size

## Impact of Māori Television among viewers: “I have more opportunity to learn te reo Māori”

(%)



▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# There has been an increase in agreement within both the Māori General Population and Māori Youth that their te reo ability has improved as a result of viewing Māori Television

## Key findings

- Three in five Māori Television viewers within the Māori General Population and 56% within Māori Youth agree that their te reo ability has improved as a result of viewing Māori Television
- Agreement does however differ by language group being highest among Fluent Speakers and more moderate among the Receptive Audience
- Among the Rest of NZ population who view Māori Television, 31% agree that their te reo ability has improved consistent with previous years

2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	75 ▲	64	47 ▼	32 ▼
Māori Youth	81 ▲	57	38 ▼	Sample size too small

Source: Do you think any of the following has changed as a result of Māori Television?

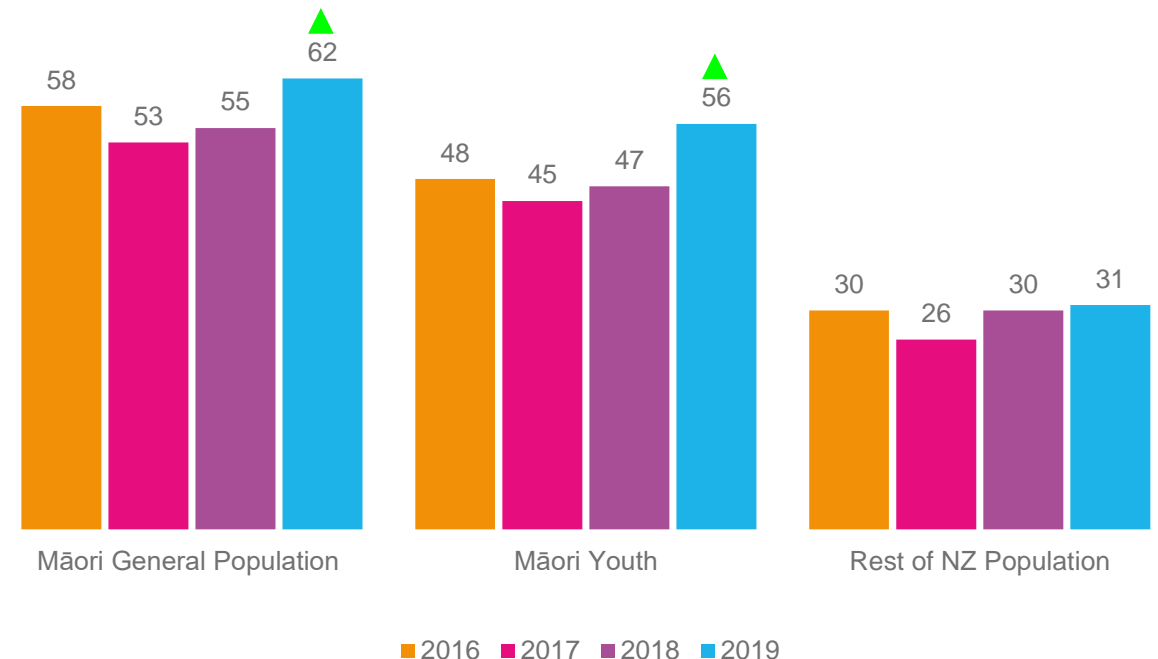
Base: n = 2016 | 2017 | 2018 | 2019; Māori Television viewers: Māori General Population n = 577 | 609 | 577 | 858; Māori Youth n = 327 | 317 | 327 | 316; Rest of NZ Population n = 309 | 443 |

455 | 635 (n = F, S, R,N): Māori General Population 2019 (n = 241, 356, 226, 35); Māori Youth 2018 (n = 73, 138, 97, 8)

1. Caution low base size

## Impact of Māori Television among viewers: “My te reo Māori ability has improved”

(%)



▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

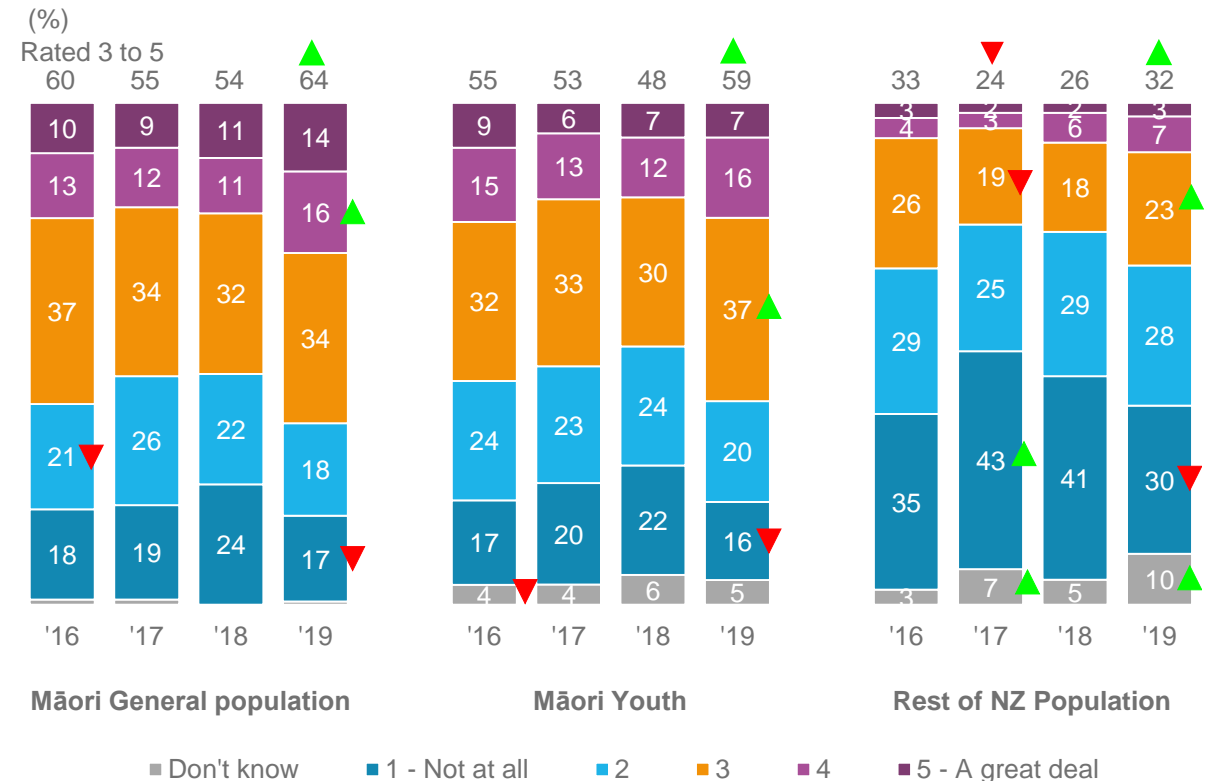
# There has also been an increase in agreement among all audience groups that their understanding of te re Māori has improved due to viewing or listening to Māori programming

## Key findings

- Two in three viewers or listeners of Māori programming within the General Māori Population now agree (rating as 3 to 5) that their understanding of te reo Māori has increased due to watching or listening to Māori programming
  - This is due to an increase in those rating as 4 or 5 from 22% to 30%
- Among Māori programming viewers and listeners, there has also been an increase in agreement (rating 3 or 5) among Māori Youth (to 59%) and the Rest of NZ Population (to 32%) due to more rating as '3'
- The Rest of NZ population does however remain more likely to disagree than agree that their understanding of te reo has improved which is likely to be a reflection of the programmes that they view
- Of the language groups, Fluent Speakers remain most likely to agree that their understanding of te reo has improved

Rated 3 to 5 – 2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	85 ▲	67	45 ▼	25 ▼
Māori Youth	84 ▲	65	42 ▼	Sample size too small

## Impact of Māori programming among viewers and listeners: 'My understanding of te reo Māori has increased'



Source: As a result of watching or listening to Māori programming in general, to what extent would you say that each of the following has increased or improved?  
 Base: n = 2016 | 2017 | 2018 | 2019; Māori programming viewers or listeners: Māori General Population n = 589 | 607 | 583 | 934; Māori Youth n = 327 | 317 | 338 | 380; Rest of NZ Population n = 334 | 451 | 466 | 759; (n = F, S, R,N): Māori General Population 2019 (n = 253, 379, 260, 42); Māori Youth 2018 (n = 80, 159, 128, 13)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

7

## Māori Culture – understanding and impact of broadcasting

# Claimed understanding of Māori culture continues to strengthen within the Māori General Population

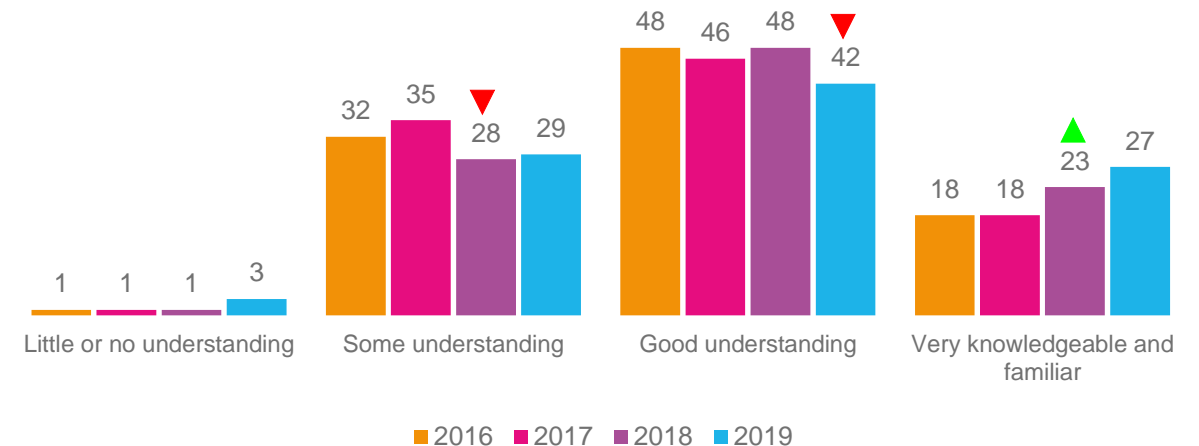
## Key findings

- Within the Māori General Population, 27% now claim to be very knowledgeable about Māori culture while a further 42% have a good understanding
- Those with only some understanding is stable at 29%
- Almost all Fluent Speakers are either very knowledgeable or have a good understanding
- In contrast, the other language groups typically aren't very knowledgeable but almost all have at least some understanding of Māori culture

2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Very knowledgeable	65 ▲	17 ▼	8 ▼	12 ▼
Good understanding	32 ▼	57 ▲	32 ▼	25 ▼
Some understanding	3 ▼	24 ▼	53 ▲	52 ▲
No understanding	0 ▼	1 ▼	6 ▲	11 ▲

## Level of Māori culture understanding – Māori General Population

(%)



Source: Māori culture includes tikanga (customs /protocols), values, arts and cultural activities. Which of the following statements best describes your understanding of Māori culture?  
 Base: 2016 | 2017 | 2018 } 2019: Māori General Population: n = 600 | 633 | 603 | 1012

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# Similar to the Māori General Population, claimed understanding of Māori culture continues to slowly strengthen within Māori Youth

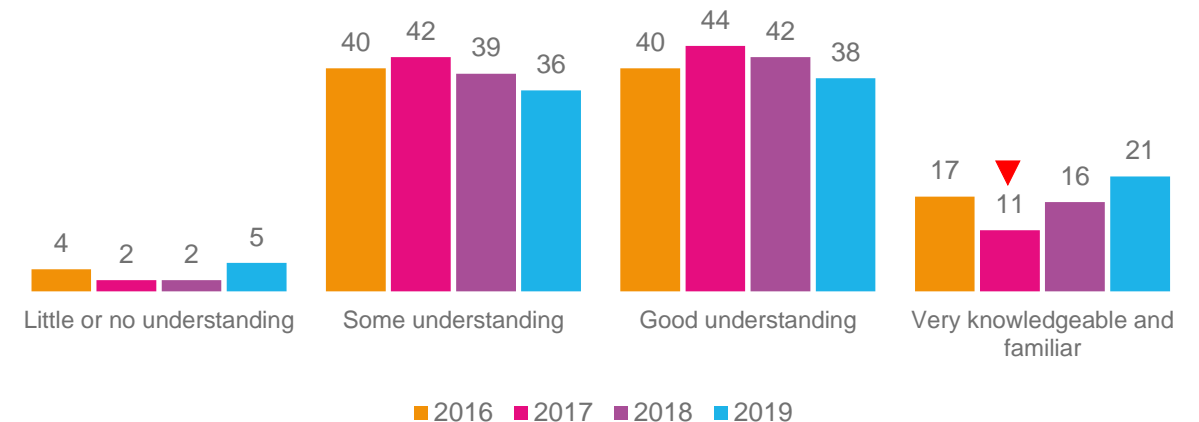
## Key findings

- Among Māori Youth, those claiming to be very knowledgeable about Māori culture continues to slowly increase and is currently 21% with a further 38% having a good understanding
- Similar to the Māori General Population, almost all Māori Youth who are Fluent Speakers are either very knowledgeable or have a good understanding while the other language groups typically have at least some understanding of Māori culture

2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Very knowledgeable	53 ▲	24	6 ▼	0 ▼
Good understanding	39	50 ▲	30 ▼	20 ▼
Some understanding	8 ▼	24 ▼	56 ▲	58 ▲
No understanding	0 ▼	2 ▼	7	22 ▲

## Level of Māori culture understanding – Māori Youth

(%)



Source: Māori culture includes tikanga (customs /protocols), values, arts and cultural activities. Which of the following statements best describes your understanding of Māori culture?  
 Base: 2016 | 2017 | 2018 } 2019: Māori Youth: n = 32 | 341 | 361 | 472; (F,S,R,N) (n = 87, 178, 173, 34)

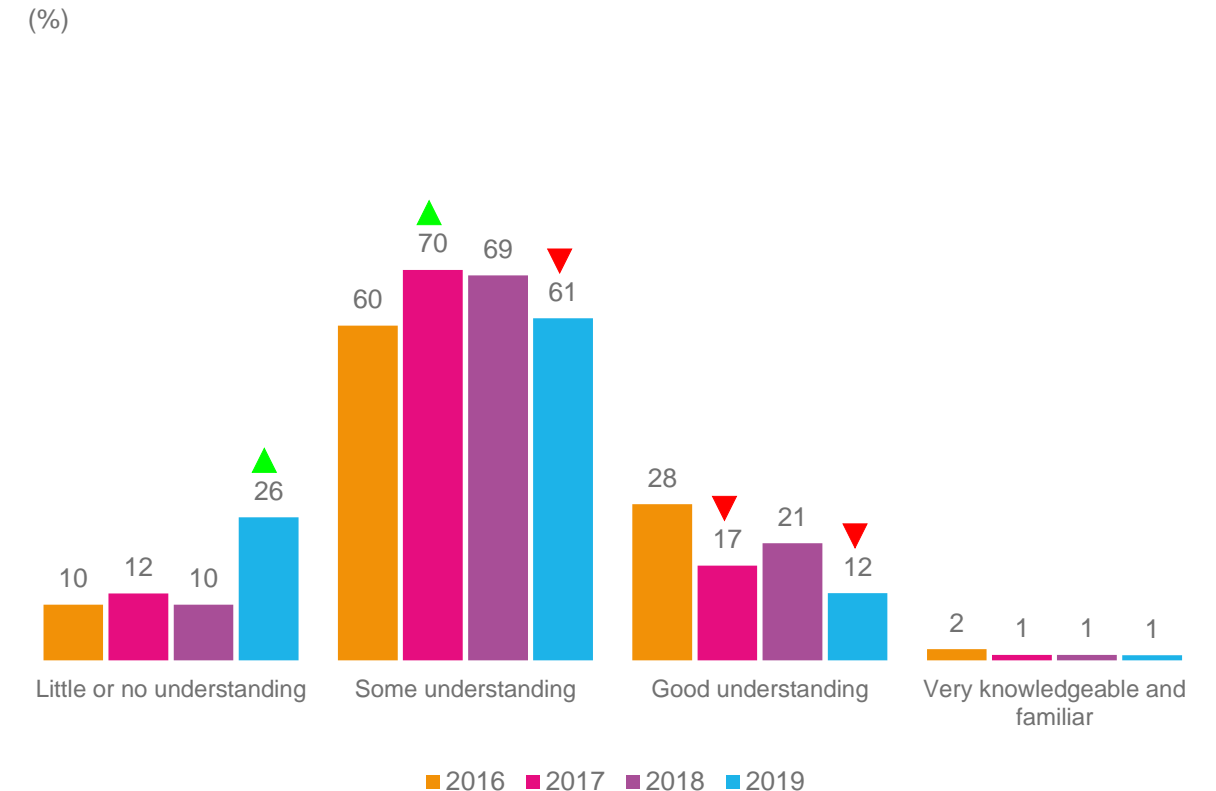
▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# Only 13% within the Rest of NZ Population claim to have a good understanding of Māori culture while one in four have little or no understanding

## Key findings

- Question wording was updated in 2019 to clarify in the online survey among the Rest of NZ Population that 'Māori culture includes tikanga (customs /protocols), values, arts and cultural activities' (Note: The clarification was added in response to respondent confusion during the questionnaire design stage about what Māori culture encompasses)
- Following the clarification, fewer within the Rest of NZ Population now claim to have a good understanding or be very knowledgeable about Māori culture (at 13%) or to have some understanding (at 61%) while those claiming to have little or no understanding has increased from 10% to 26%

## Level of Māori culture understanding – Rest of NZ Population



Source: Māori culture includes tikanga (customs /protocols), values, arts and cultural activities. Which of the following statements best describes your understanding of Māori culture?  
 Base: n = 2016 | 2017 | 2018 } 2019: Rest of NZ Population: n = 400 | 570 | 600 | 1500

▲ ▼ Significantly higher / lower than previous year at 95% C.L.

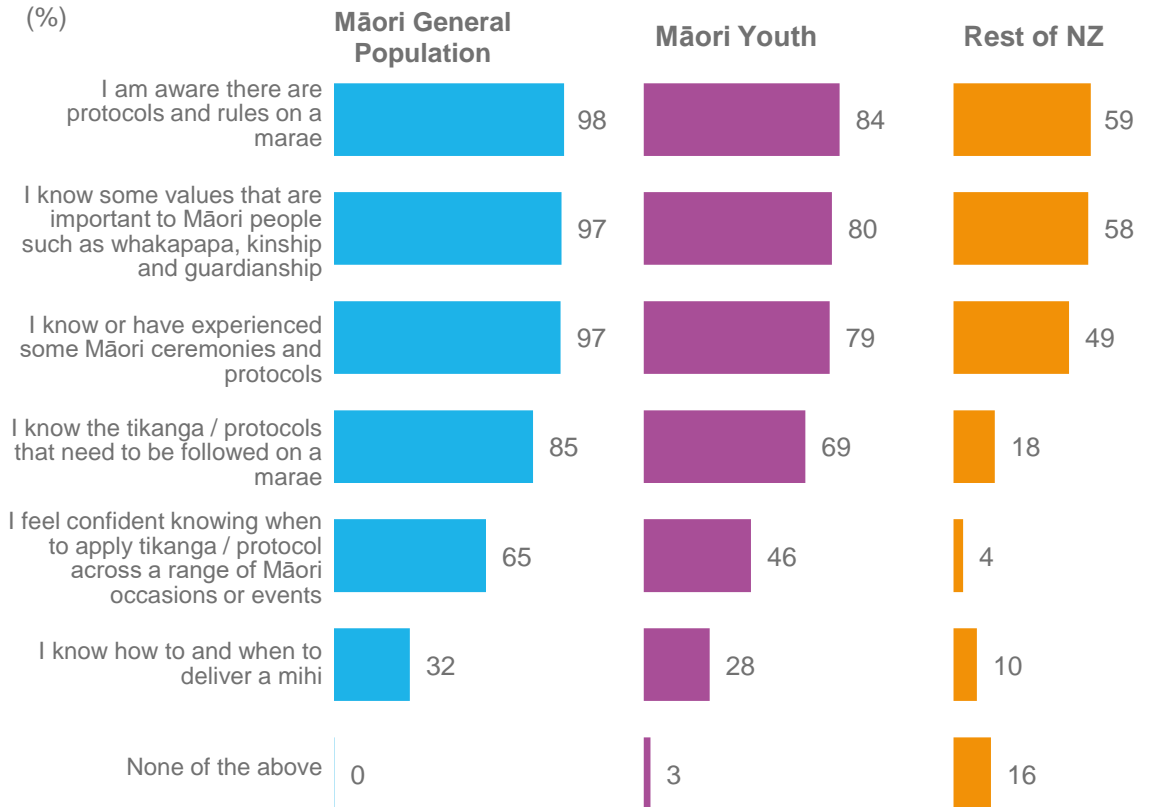


# Although levels are slightly higher among the Māori General Population, most Māori Youth have a good knowledge of many aspects of Māori culture

## Key findings

- The majority within the Māori General Population and four in five Māori Youth are aware there are protocols on a marae, know some of the values that are important and know or have experienced some ceremonies and protocols
- These aspects also have the highest level of knowledge among the Rest of NZ Population ranging from 59% being aware there are rules on a marae to 49% having experienced some Māori ceremonies and protocols
- Māori Youth are less confident than the Māori General Population that they know when to apply tikanga but being similar for knowing how and when to deliver a mihi

## Māori culture ability



Source: Please tell me which of the following apply to you...

Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500

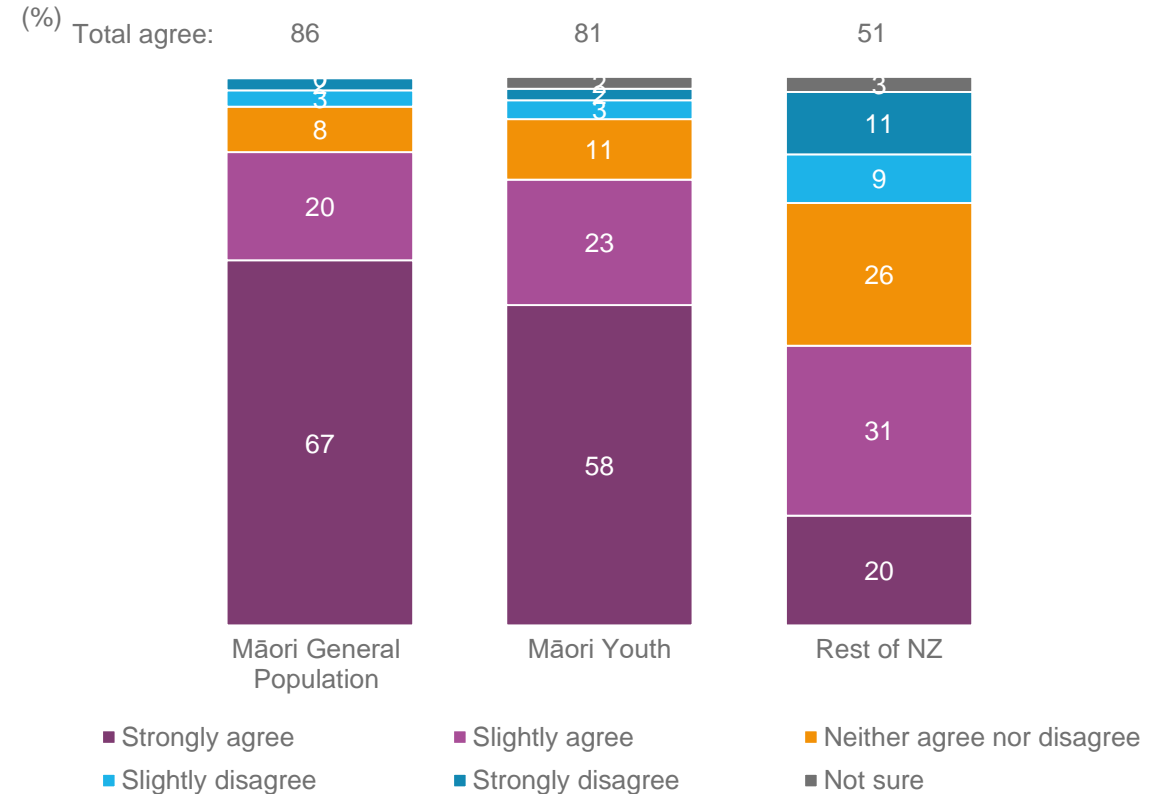
# There is high interest in learning more about Māori culture among the Māori General Population and Māori Youth and one in two Rest of NZ Population also express interest

## Key findings

- Just under nine in ten among the Māori General Population agree that they would like to improve their understanding of te reo and 67% strongly so
- There is also high agreement among Māori Youth, with four in five interested in improving their understanding of te reo and 58% strongly so
- Among the Rest of NZ Population, half would like to improve their te reo understanding and 20% strongly so
- Among the Māori General Population, Fluent Speakers and Second Language Learners are most likely to 'strongly agree' that they would like to improve their te reo understanding
- Among Māori Youth, the Receptive Audience has a similar level of interest to Fluent Speakers and Second Language Learners

Strongly agree:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	73 ▲	73 ▲	63	6 ▼
Māori Youth	69 ▲	64 ▲	61	0 ▼

## Interest in learning more about Māori culture



Source: Do you agree, disagree or neither that you would like to learn more about Māori culture?

Base: Māori General Population n = 1012 | Māori Youth n = 472 | Rest of NZ n = 1500; (F,S,R,N) Māori General Population (n = 256, 399, 303, 54) | Māori Youth (n = 87, 178, 173, 34)

▲ ▼ Significantly higher / lower than other language groups at 95% C.L.

# Māori Television remains effective in providing opportunities to learn about Māori culture across all audience groups

## Key findings

- The majority of Māori Television viewers within the Māori General Population (88%) and Māori Youth (87%) agree that they have more opportunity to learn about Māori culture as a result of viewing Māori Television
- Agreement is high among all language groups within both the Māori General Population and Māori Youth
- Among Māori Television viewers within the Rest of NZ Population, two in three agree that they have more opportunity to learn about Māori culture

2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	87	91 ▲	88	68 ▼
Māori Youth	94	89	82	Sample size too small

Source: Do you think any of the following has changed as a result of Māori Television?

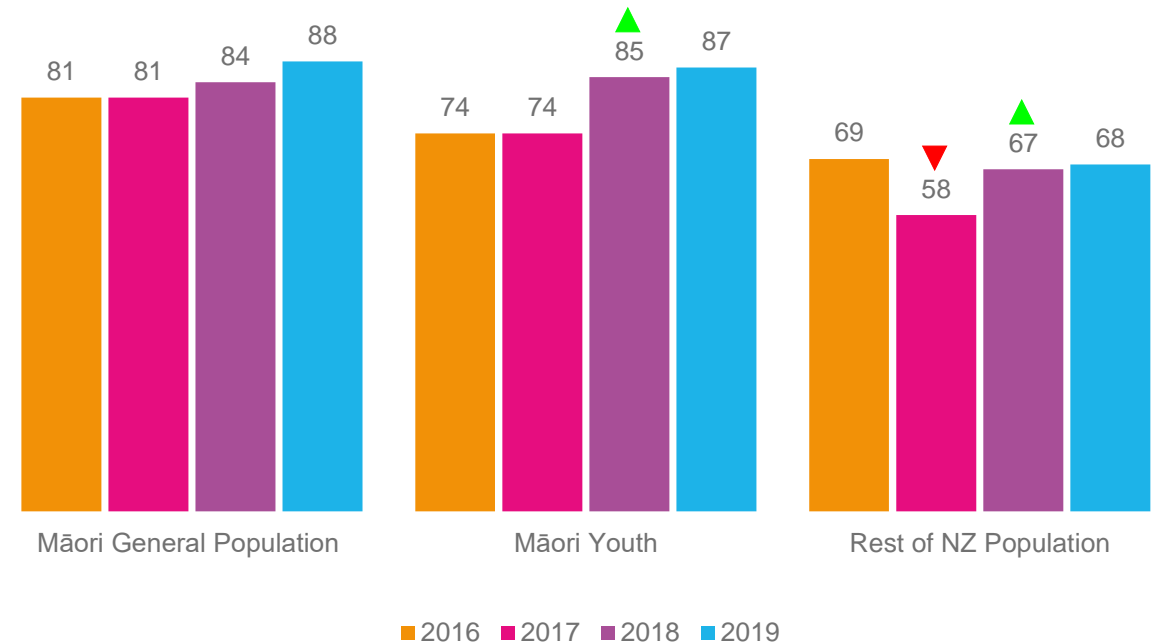
Base: n = 2016 | 2017 | 2018 | 2019; Māori Television viewers: Māori General Population n = 577 | 609 | 577 | 858; Māori Youth n = 327 | 317 | 327 | 316; Rest of NZ Population n = 309 | 443 |

455 | 635 (n = F, S, R,N): Māori General Population 2019 (n = 241, 356, 226, 35); Māori Youth 2018 (n = 73, 138, 97, 8)

1. Caution low base size

## Impact of Māori Television among viewers: “I have more opportunity to learn about Māori culture”

(%)



▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# Māori Television is increasingly improving knowledge of Māori culture

## Key findings

- Among Māori Television viewers, agreement has increased within both the Māori General Population (to 72%) and Māori Youth (to 70%) that viewing Māori Television has improved their knowledge of Māori culture
- Within the language groups, agreement is stable among Fluent Speakers and Second Language Learners, while improving among the Receptive Audience
- Although not statistically significant, agreement is also higher among Māori Television viewers within the Rest of NZ Population at 50%

2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	80 ▲	72	68	39 ▼
Māori Youth	85 ▲	73 ▼	58	Sample size too small

Source: Do you think any of the following has changed as a result of Māori Television?

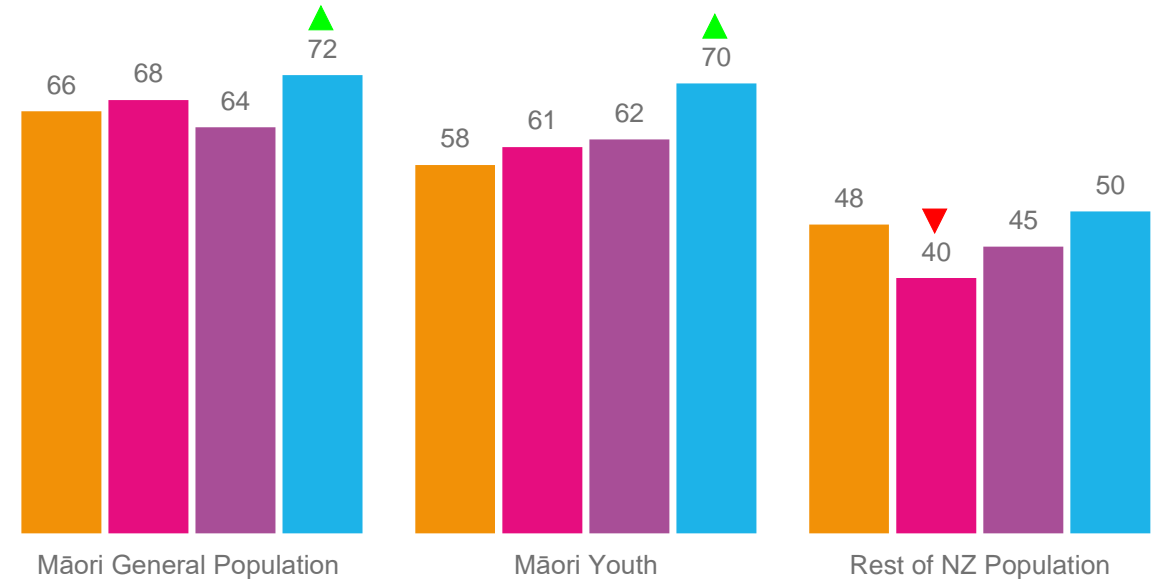
Base: n = 2016 | 2017 | 2018 | 2019; Māori Television viewers: Māori General Population n = 577 | 609 | 577 | 858; Māori Youth n = 327 | 317 | 327 | 316; Rest of NZ Population n = 309 | 443 |

455 | 635 (n = F, S, R,N): Māori General Population 2019 (n = 241, 356, 226, 35); Māori Youth 2018 (n = 73, 138, 97, 8)

1. Caution low base size

## Impact of Māori Television among viewers: “My knowledge of Māori culture has improved”

(%)



■ 2016 ■ 2017 ■ 2018 ■ 2019

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

# There has also been an increase in agreement with being better informed on Māori issues as a result of viewing Māori Television

## Key findings

- There has been a significant increase in agreement among Māori Television viewers within the Māori General Population (to 79%) and the Rest of NZ Population (to 54%) that they are better informed on Māori issues as a result of viewing Māori Television
- Although not statistically significant, there has also been an increase in agreement among Māori Youth to 68%
- By language group, although remaining lower than Fluent Speakers and Second Language Learners, the main increase in agreement has been among the Receptive Audience

2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive <sup>(1)</sup>
Māori General Population	92 ▲	78	73 ▼	48 ▼
Māori Youth	88 ▲	67	59 ▼	Sample size too small

Source: Do you think any of the following has changed as a result of Māori Television?

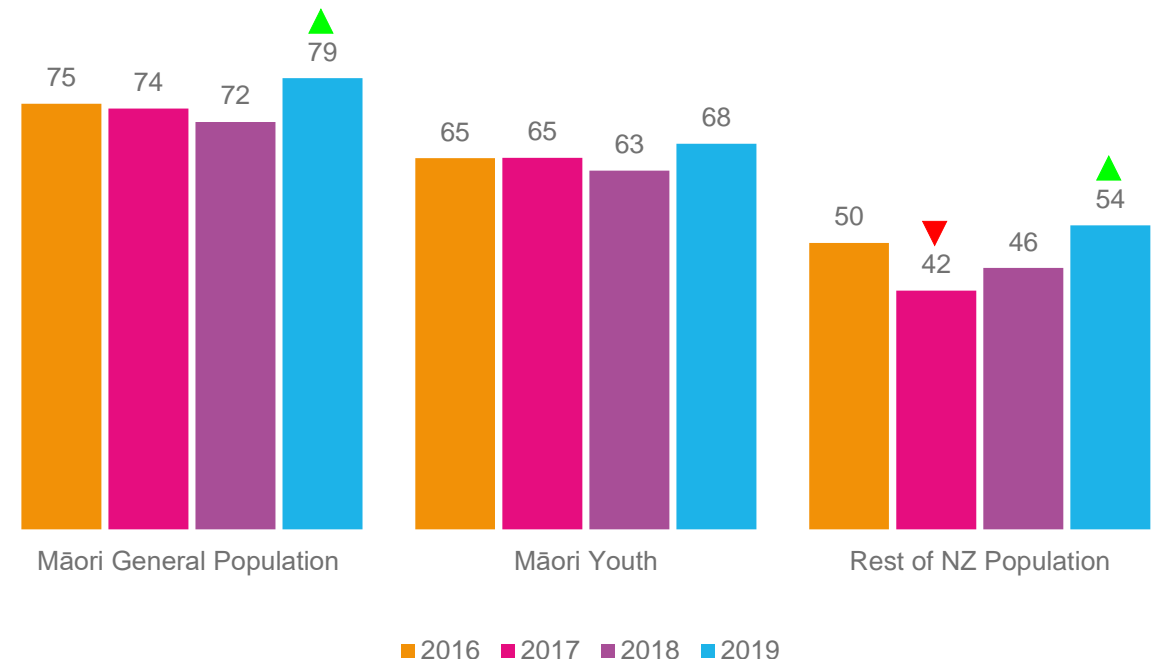
Base: n = 2016 | 2017 | 2018 | 2019; Māori Television viewers: Māori General Population n = 577 | 609 | 577 | 858; Māori Youth n = 327 | 317 | 327 | 316; Rest of NZ Population n = 309 | 443 |

455 | 635 (n = F, S, R,N): Māori General Population 2019 (n = 241, 356, 226, 35); Māori Youth 2018 (n = 73, 138, 97, 8)

1. Caution low base size

## Impact of Māori Television among viewers: "I am better informed on Māori issues"

(%)



▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

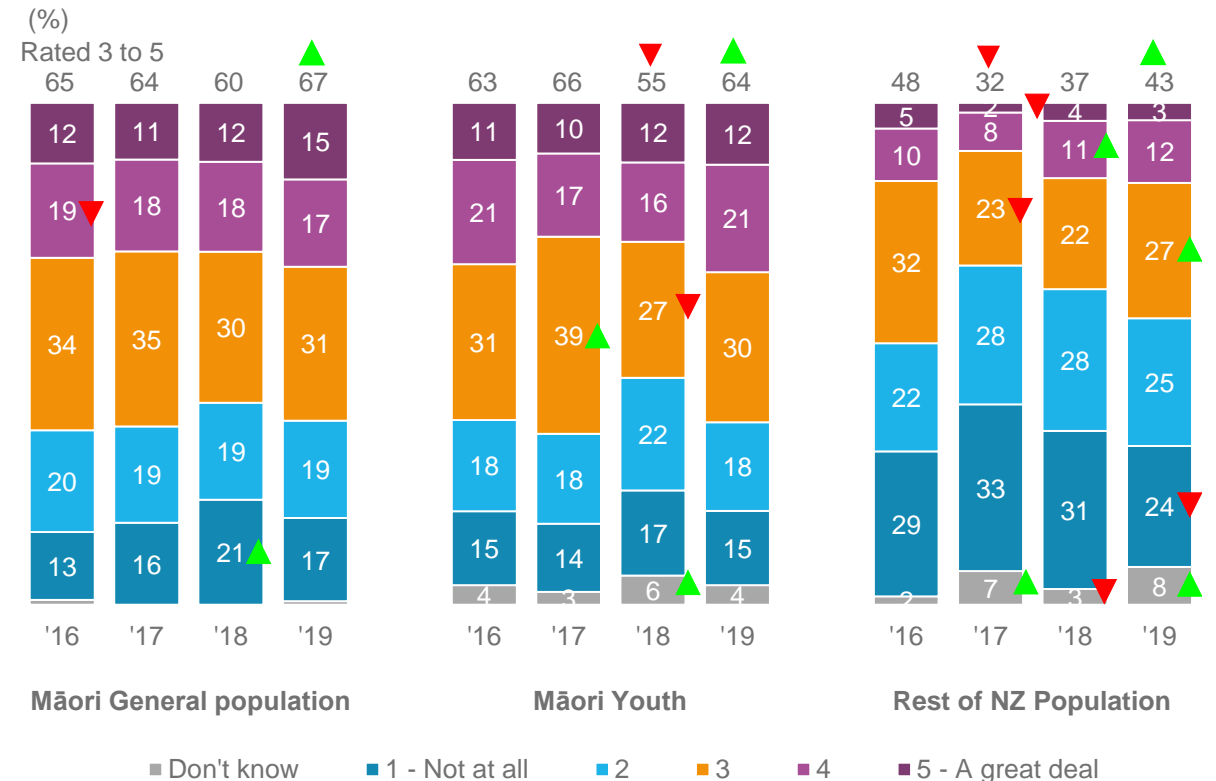
# Similarly, there has also been an increase among viewers and listeners of Māori programming within all groups that their awareness and knowledge of Māori culture has increased

## Key findings

- Among Māori programming viewers and listeners, 67% within the Māori General Population now agree that their understanding of Māori culture has increased due to Māori programming (rated as 3 to 5)
- Following a decrease in 2019, agreement has returned to previous levels among Māori Youth with 64% agreeing their understanding of Māori culture has improved (rating as 3 to 5)
- Among the Rest of NZ Population, 43% now agree (rating as 3 to 5) that their understanding of Māori culture has improved with this increase due to more rating as '3'
- Of the language groups, Fluent Speakers remain most likely to agree that their understanding has improved

Rated 3 to 5 – 2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	82 ▲	69	57 ▼	17 ▼
Māori Youth	84 ▲	63	57	Sample size too small

## Impact of Māori programming among viewers and listeners: "My understanding of Māori culture has increased"



Source: As a result of watching or listening to Māori programming in general, to what extent would you say that each of the following has increased or improved?  
 Base: n = 2016 | 2017 | 2018 | 2019; Māori programming viewers or listeners: Māori General Population n = 589 | 607 | 583 | 934; Māori Youth n = 327 | 317 | 338 | 380; Rest of NZ Population n = 334 | 451 | 466 | 759; (n = F, S, R,N): Māori General Population 2019 (n = 253, 379, 260, 42); Māori Youth 2018 (n = 80, 159, 128, 13)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

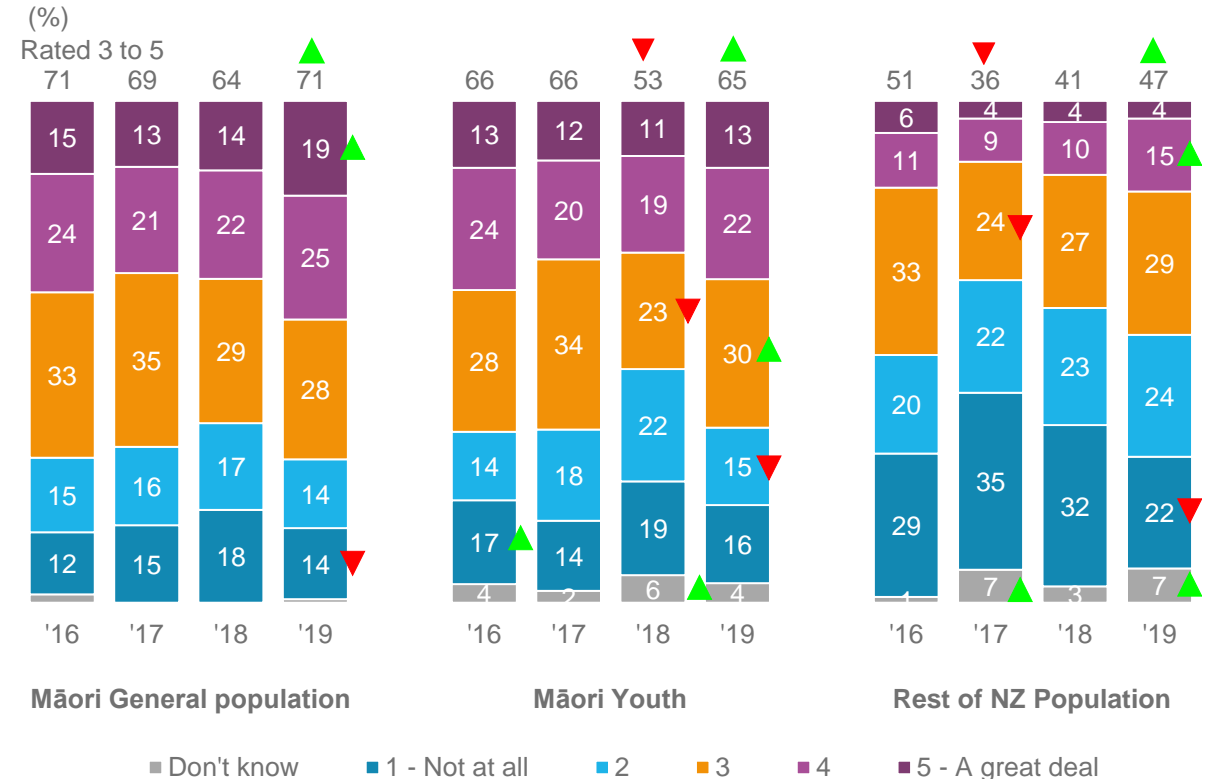
# There has also been an increase among viewers and listeners of Māori programming within all groups that their awareness and knowledge of Māori perspectives has increased

## Key findings

- Among Māori programming viewers and listeners, after decreasing in 2018 there has been an increase in agreement (rating as 3 to 5) that Māori programming has helped to increase their understanding of Māori perspectives to 71% among the Māori General Population and 65% among Māori Youth
- Agreement has also increased among the Rest of NZ Audience to 47%
- Agreement is typically highest among Fluent Speakers followed by Second Language Learners

Rated 3 to 5 – 2019:	Fluent Speakers	Second Language	Receptive Audience	Non Receptive
Māori General Population	85 ▲	76 ▲	58 ▼	24 ▼
Māori Youth	82 ▲	67	56 ▼	Sample size too small

## Impact of Māori programming among viewers and listeners: 'My awareness and knowledge of Māori perspectives has increased'



Source: As a result of watching or listening to Māori programming in general, to what extent would you say that each of the following has increased or improved?  
 Base: n = 2016 | 2017 | 2018 | 2019; Māori programming viewers or listeners: Māori General Population n = 589 | 607 | 583 | 934; Māori Youth n = 327 | 317 | 338 | 380; Rest of NZ Population n = 334 | 451 | 466 | 759; (n = F, S, R,N): Māori General Population 2019 (n = 253, 379, 260, 42); Māori Youth 2018 (n = 80, 159, 128, 13)

▲ ▼ Significantly higher / lower than previous year / other language groups at 95% C.L.

## **Appendix: Methodology**





# The following staged approach was taken to the ZePA Model / Audience Survey 2019



- To investigate the attitudes and behaviours of NZ'ers towards te reo and Māori culture and provide context around audience behaviour
- Purpose to provide input into the quantitative survey to ensure that relevant attitudes, behaviours and audience measures are collected

- Development of a revised questionnaire to better capture the inputs required for the ZePA model and audience measures
- Cognitive testing phase to check the questionnaire for question wording, clarity and overall survey flow

- Telephone and online interviewing

- Data cleaning, weighting and analysis
- Creation of the ZePA model based on the 2017 model but refined (if a wider number of questions gathered)
- Report generation
- Formal presentation to key stakeholders

# Qualitative research was undertaken to provide greater understanding around attitudes and behaviours to help inform a revised quantitative survey

## Initial qualitative phase

- 5 x 90 minute qualitative focus groups were held among Māori and Rest of New Zealand
- Groups were recruited to reflect range of ZePa model audience segments
- Jeremy Tātēre MacLeod and Te Rina MacLeod worked in partnership with Kantar to recruit, moderate and host Māori groups in Heretaunga, and ensure all research followed appropriate tikanga
  - Participants in these groups were offered the opportunity to engage in the discussion in English or te reo
  - Jeremy has also been involved in contributing to the analysis and review of the qualitative research phase
- Representation of iwi across Māori sample:
  - Ngāti Kahungunu, Ngāti Tūwharetoa, Tainui, Ngāti Maniapoto, Ngāti Raukawa, Rangitāne ki Wairau, Ngāti Porou, Rongomaiwahine, Ngāti Manawa
- All participants were offered an \$80 koha for their participation, assured anonymity and consented to their participation

Group description	Location
Māori; low cultural engagement	Community venue Tāmaki/Auckland
Māori; Culturally Active (A1), language learners	Community venue Heretaunga/Hastings
Māori; Culturally Active (A1), fluent te reo speakers	Community venue Heretaunga/Hastings
Rest of NZ; less engaged with Māori culture	Kantar offices Tāmaki/Auckland
Rest of NZ; more engaged with Māori culture	Kantar offices Tāmaki/Auckland

# The survey development was an iterative process including both a cognitive phase to check for clarity and a pilot phase to check for length

## Questionnaire development and testing

### Questionnaire development:

- A draft survey was developed by Kantar implementing recommendations from the qualitative phase and signed off by Te Māngai Pāho

### Cognitive testing:

- A testing phase was undertaken of the draft questionnaire to check for question wording, clarity and overall survey flow and ensure that free of potential respondent confusion
- A total of 8 interviews were carried out at the Kantar offices in Auckland on 28th June and 1st July 2019
- A broad range of New Zealanders were recruited in terms of gender and age with four interviews among New Zealanders of Māori descent and four among rest of New Zealand
- The process involved administering the questionnaire in a one-on-one face-to-face interview. In each case the respective questions were read aloud and after each question we would discuss what the respondent believed was being asked and as appropriate, we would discuss whether they could provide a response to understand how these had been formulated
- A report was provided outlining issues relating to questionnaires or codes and recommendations and a final draft survey was developed implementing the recommendations as agreed with Te Māngai Pāho

### Questionnaire set up and pilot testing

- Following the changes from the cognitive phase, the survey was set up for a pilot phase of fieldwork
- The pilot phase was used to:
  - Check survey length
  - Check whether any aspects that need to be further refined
- Following the pilot phase further changes were made to the questionnaire to reduce survey length

# The Māori General Population was interviewed via telephone and the Rest of New Zealand via online surveying

## Fieldwork

### Data collection and sampling

- The research covers three audience groups defined as:
  - Māori General Population: Māori aged 15 plus
  - Māori Youth: Māori aged 15 to 24 years
  - Rest of NZ Population: Non Māori New Zealanders aged 15 plus
- The methodology consists of a mix of telephone and online interviewing
  - N = 1000 interviews among the Māori General Population aged 15 plus interviewed via telephone using a random sample from the Māori Electoral Roll
  - N = 1500 interviews among the Rest of NZ Population aged 15 plus interviewed via online panel surveying
  - N = 200 boost interviews among Māori Youth aged 15 to 24 interviewed via online panel sampling
- Interviewing was conducted between 6<sup>th</sup> July 2019 and 19<sup>th</sup> August 2019

### Quotas

- Broad gender and age quotas were placed on the Māori General Population at the interviewing stage proportional to the Māori population
- Broad gender, age, area and ethnicity quotas were placed on the Rest of NZ Population at the interviewing stage proportional to the rest of NZ population
- No quotas were placed on the boost online sample of Māori Youth

### Interview duration

- The telephone interviews averaged 20 minutes in length
- The online survey averaged 14 minutes in length

# Interviewing details

## Fieldwork

### Computer Aided Telephone Interviewing (CATI)

#### Māori General Population:

- Names were randomly selected from the Māori Electoral Roll and telematched to provide a sample of phone numbers
- Households were then randomly selected for calling and the adult with the last birthday was requested for interviewing rather than the named person on the Māori Electoral Roll. This approach allows for Māori not registered on the Electoral Roll, or those who may be registered on the General Electoral Roll, to be approached
- To help fill quotas for specific age groups that are difficult to achieve, and to ensure that those within the Māori population with a mobile phone only were not excluded, 30% of respondents were targeted using mobile numbers that had been tele-matched from the Māori Electoral Roll

### Online interviewing

#### Rest of NZ Population

- Two online panels were used to interview the Rest of NZ Population to help extend the reach of the panels, being ConsumerLink and Dynata
- Email messages were sent to eligible Non Māori panel members aged 18 plus and eligible Māori aged between 18 and 24 years inviting them to participate in the survey
- Those who wanted to participate in the survey were directed to the questionnaire via a hyperlink
- The hyperlink allowed direct access to a secure website where the respondents could complete the questionnaire in their own time
- Respondents aged 15 to 17 years were recruited via their parents to participate

# Weighting has been applied to ensure that all audience groups are representative of the applicable population

## Data analysis and reporting

### Analysis and weighting:

- All analysis has been conducted using SPSS
- The Māori General Population dataset collected via telephone and Rest of NZ dataset collected via online were cleaned and merged into one combined dataset
- The Māori Youth dataset collected via telephone and via online were merged into one combined dataset
- Weighting has been applied at the analysis stage to ensure that the Māori General Population is representative of the Māori population in terms of gender by age and region
- Māori Youth have been weighted for both the CATI and online sample to be representative in terms of gender by age and to report on a 50/50 sample split (as the achieved number of CATI and online interviews vary year on year)
- The Rest of NZ Population has been weighted to rest of New Zealand population figures in terms of gender by age and region

### Statistical testing:

- Statistical testing has been conducted at the 95% Confidence Level to compare results between audience groups, language groups and trends over time

# Changes in the questionnaire have resulted in a shift in allocation of the Māori General Population and Māori Youth to the four language groups

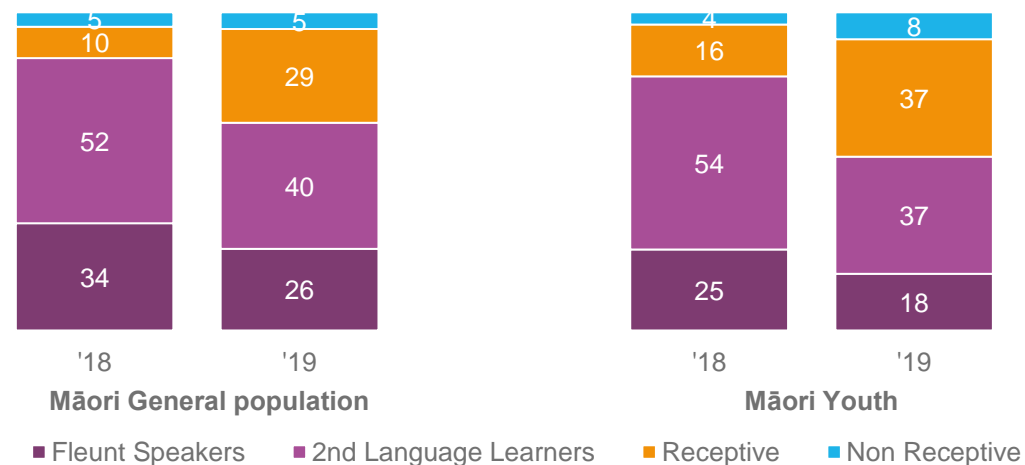
## Language groups

### Definition:

The definitions of the four language groups have been revised in 2019 as a result of question wording changes as follows:

Language group	Previous criteria	2019 criteria
Fluent Speakers	Fluent or good understanding of te reo Māori	Fluent or good understanding of te reo Māori
Second Language Learners	Some understanding of te reo Māori	Some understanding of te reo Māori
Receptive Audience	Little or no understanding of te reo Māori but open to improving	Little or no understanding of te reo Māori but agree would like to improve
Non-receptive Audience	Little or no understanding of te reo Māori and not open to improving	Little or no understanding of te reo Māori and neutral or disagree would like to improve

- The 2019 questionnaire also separated 'no' and 'little' understanding in the codes as defined little understanding as follows:
  - I have no understanding of te reo Māori
  - I have little understanding other than greetings and a few basic words
- As a result, there has been more respondents classify themselves as 'little' rather than 'some' understanding and there are fewer 2<sup>nd</sup> Language Learners and more Receptive as follows:



# Demographic profile – 2019

		Māori General Population (%)		Māori Youth (%)		Rest of NZ Population (%)	
		Unweighted	Weighted	Unweighted	Weighted	Unweighted	Weighted
Gender	Male	47	47	40	49	49	48
	Female	53	53	60	51	51	52
Age	15-18 years	15	15	41	44	3	3
	19-24 years	11	12	59	56	13	13
	25-34 years	17	18	0	0	15	15
	35-44 years	20	19	0	0	17	17
	45-54 years	17	17	0	0	18	18
	55-64 years	11	11	0	0	15	15
	65 years plus	8	8	0	0	19	19
Ethnicity	Māori	100	100	100	100	0	0
	New Zealand European	45	44	52	54	81	81
	Pacific People	6	6	9	9	8	8
	Other	1	1	2	2	15	15
Employment Status	Employed full time	51	51	24	23	48	48
	Employed 20 hours or less	7	7	9	10	10	10
	Retired / pensioned	8	8	0	0	17	17
	Student	18	18	46	46	8	8
	Unemployed	4	4	11	12	4	4
	Homemaker	5	5	4	4	7	7
	Voluntary worker	1	1	1	1	1	1
	Other	5	5	3	3	3	3
BASE:		1012	1012	472	472	1500	1500



## Demographic profile – 2019 (cont'd)

		Māori General Population (%)		Māori Youth (%)		Rest of NZ Population (%)	
Region		Unweighted	Weighted	Unweighted	Weighted	Unweighted	Weighted
	Northland	7	8	7	7	2	3
	Auckland	20	24	23	23	35	34
	Waikato	14	14	12	12	8	9
	Bay of Plenty	11	12	9	10	5	6
	Gisborne	2	2	2	2	0	0
	Hawke's Bay	6	7	6	6	4	3
	Taranaki	3	3	2	2	3	2
	Manawatu-Wanganui	8	7	7	7	6	5
	Wellington	12	10	12	12	11	11
	Marlborough	1	1	0	0	1	1
	Nelson	1	1	1	1	2	2
	Tasman	0	0	0	0	1	1
	West Coast	1	1	1	1	0	0
	Canterbury	8	7	9	8	14	14
	Otago	3	2	5	5	6	6
	Southland	3	2	4	4	2	2
BASE:		1012	1012	472	472	1500	1500