

# Champions Trophy

## Case Competition 2015



### Case 3: Able New Zealand

30 January 2015

This case was prepared by Lana (Qingxin) Ye under the supervision of Sunny Gu. It has been prepared solely for the Champions Trophy Case Competition. Data used in this case has been obtained from publically available sources and Able New Zealand. The information relating to the research that Able New Zealand conducted is strictly confidential. This case is not intended to serve as an endorsement, a source of primary data or an illustration of effective or ineffective management.

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**THE UNIVERSITY  
OF AUCKLAND**

**BUSINESS SCHOOL**



**From:** Benjamin Banker  
**Sent:** Wednesday 28th January  
**To:** Able New Zealand Project Team  
**CC:** Michelle Money; David Dollar; Peter Partner; Warren Wallstreet; John Jobs  
**Subject:** Able Strategy Presentation

**Good Morning team,**

We have recently been approached by Able New Zealand (Able), a charitable organisation that provides high quality free captioning and audio description services on television programmes to assist New Zealand's vision impaired and hard-of-hearing community with access to media.

It was formerly known as Television New Zealand (TVNZ) Access Services and was operating as an arm of TVNZ. In November 2013 it got separated from TVNZ and became a stand-alone entity that provides captioning and audio description services to the New Zealand community.

Able has a passionate team of captioners and audio describers who strive to bring more accessible media to the vision impaired and hard-of-hearing community. They hold an optimistic view of Able's future growth opportunities, especially because Able is currently the only provider of these types of services for the vision impaired and hard-of-hearing communities in New Zealand. However, as an early-stage entity, obtaining a sustainable source of funding is undoubtedly a priority. Likewise, Able is looking for ways to widen its service coverage and user groups in order to move closer to its mission of bringing more accessible media to the community.

Able is fully funded by NZ On Air, a government broadcast funding agency. All of the funds have been invested in providing captioning and audio description services on television programmes, which are then broadcast through a range of television channels. However, many viewers have expressed their wishes to see more captioned and audio described programmes being broadcast on more channels.

As a result, the Chief Executive Officer (CEO) of Able, Wendy Youens, has approached us and expressed her interest in hearing your recommendations in respect of Able's future operations. In addition to the need for a sustainable source of funding, Able wishes to create new initiatives that can help market its services to the community and widen its service coverage through wider range of channels and television programmes.

You will have ten minutes to present your recommendations, which will be followed by a ten-minute question and answer session to clarify any issues that may arise from the presentation. Our research team has compiled some relevant information, which can be found in the attachment to this email

Regards,

**Benjamin Banker**

Able New Zealand Project Leader

# Company profile

**able**  
making media accessible



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## Able – making media accessible

*“It is not over, Block fans! Tonight Australia’s the Block: Glasshouse begins!”*

Monday-Friday, 7:30pm, TV3. Captions available

In this technologically advanced society, accessible media is something we often take for granted. Yet, we never really think about what “accessible media” actually means. For example, how would hearing and vision-impaired people in our community get to enjoy their favourite TV shows? Maybe...Able is able to give us some ideas.

Able is a unique charitable organisation with a mission to bring more accessible media to New Zealand’s vision-impaired and hard-of-hearing community through high-quality captions and audio description. It was formerly known as Television New Zealand (TVNZ) Access Services operating under the arm of TVNZ. In late November 2013, it got separated from TVNZ and has since been operating as a stand-alone entity under the governance of the Media Access Charitable Trust.

The Chief Executive Office (CEO), Wendy Youens, is very excited about this new structure as it provides Able with more scope and flexibility in deciding its operational strategies and directions. For example, Able has notably increased the amount of captioning and audio description materials it produced throughout 2014. This new structure could also help Able achieve more operational efficiencies and earn more revenue through its commercial services arm. In the midst of this excitement, there is always a question sitting at the back of Ms Youens’ mind: How should Able move forward to widen its services coverage and bring more accessible media to all New Zealanders? As mentioned by Ms Youens, “In today’s world people rely heavily on broadcasts and online media as the primary source of information and entertainment. Therefore, our services are vital for vision impaired and hearing impaired New Zealanders.” It is important for Able to maintain a sufficient level of funding, engage proactively with the community and keep ahead of any relevant international developments.

## Our history

### Captioning

Able’s captioning services began in 1984 after funds were raised from the 1981 Telethon and through lobbying by the deaf community. The service was based at TVNZ, known as Subtitling, and had only a handful of staff producing one or two hours of captioned programmes a week.

The service then expanded in 1991 and live captioning was launched for ONE Network News during Deaf Awareness Week. Since then, Able captioned TV ONE bulletins throughout the day, starting with the Midday programme through to the Tonight news and utilising current technologies such as speech recognition input.

### Audio description

The audio description service was launched as a pilot in March 2011 with funding from NZ On Air, championed by the blind community and passionate team members. Coronation Street was the first programme to be audio described using purchased files and later in the year, locally produced programmes Nothing Trivial and Shortland Street were included.

### Able’s establishment

Able, in its current form, was brought into existence in late November 2013, launched by Minister of Broadcasting Craig Foss. It is now fully funded by the Media Access Charitable Trust and broadcasts an average of 250 hours of captioned programmes per week, covering 100 per cent of prime-time programming across TV ONE and TV2, with a selection across TV3 and FOUR. It also audio describes a selection of movies and a range of local and international content during prime-time across TV ONE and TV2. An average of 20 hours a week of audio described content is now broadcast with significant preference for local content.



# Able's operations



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## High quality captions and audio description services

When captions are turned on for a closed-captioned television programme or other media, transcription of the dialogue will appear at the bottom of your TV screen, along with description of music and other sound effects, such as laughter.

Captions are designed for deaf and hard-of-hearing viewers to gain access to television programmes and other types of media. They also assist viewers who are learning English and/or are watching television in noisy environments. People in New Zealand can access captioned programmes through TV ONE, TV2, TV3, FOUR, TVNZ Heartland and some SKY channels.

Captions are not quite the same as subtitles. Subtitles are usually direct translations of the programme dialogue whereas captions are the transcribed programme dialogue in English, along with music, sound effects and tone of voice.

In order to access captions, viewers can look for the caption logo on Able's captioned listings page, the TV's electronic programme guide (EPG), and the broadcasters' TV guides to find out which programmes are captioned. By following the instructions provided on Able's website and/or by the broadcasters, households can turn on captions and easily access the captioned programmes.

Audio description is an audio narrative that describes the on-screen actions and plays in the gaps between the programme

narrative, such as "The man walks into the room and collects his coat". It is a second audio track that can be turned on and off and it describes the important visual elements of a programme.

Through audio description, Able can help blind and vision impaired people gain access to TV, DVDs and movies, and provide them with equal access to media. Similarly, viewers can look for the audio description logo on Able's audio described listing page, the TV's EPG and TVNZ's TV guides to find out which programmes are audio described.

In terms of the programmes for which Able provides captioning and audio description, most of the content is local New Zealand programming but from time to time, the content can also be international in origin. However, with the current level of funding, Able only provides free-to-air TV audio description for a selected number of prime-time programmes on TV ONE and TV2. Consequently, a strong emphasis is placed on local and prime-time programmes that are in high demand. In addition, Able is looking to expand its online OnDemand services as currently neither TVNZ or Mediaworks provides captioning or audio description services on their online platforms. As a result, Able sees this area as a big business opportunity and is keen on making captions available for TVNZ OnDemand or 3Now On Demand those online platforms

## Commercial services

As well as captioning and audio description services, Able also offers commercial services that add an extra revenue stream and provide an additional way for Able to engage with the wider community. Currently, under its commercial services, Able provides captioning on television commercials, which is generally easy and hassle free. Likewise, it provides captioning and audio descriptions for DVDs, online videos and other kinds of media. Overall, these commercial services enable more viewers connect with Able, and Able can strengthen its eminence in the market. At the same time, as advertisers often want to be socially responsible, by working with Able they can foster a strong brand image and their brands will be recognised as ones that care about equal access and inclusion for all New Zealanders.

For a small fee, advertisers that use Able's captioning services can reach up to 700,000 deaf and hard-of-hearing viewers, plus viewers in noisy environment such as bars, gyms and airports. Research studies completed by the National Captioning Institute of America found that hard-of-hearing viewers are 66 percent more likely to buy products from advertisers who caption their commercials and 54 percent of the viewers seek out products from advertisers who caption their commercials. Similarly, advertisers who use Able's audio description services can reach up to 125,000 blind and vision impaired viewers in New Zealand.

It goes without saying that the sales revenue for commercial services can reduce Able's financial reliance on government funding from NZ On Air. To ensure that these commercial services represent an attractive offer, Able charges competitive rates, at more or less the same level as Australian service providers. That is, \$200 (exclusive of 15 percent GST) per commercial with a standard one-day turnaround regardless of the duration of the content. Additional fees then apply for less than one-day turnaround and \$100 is charged for each revision that the advertisers request.

However, as Australia has a much bigger market in terms of the number of captioning service providers price competition is simply inevitable for providing captioning on long-format programmes (i.e. duration of 60 minutes). One of the captioning providers in Australia charges a very low closed captioning rate per minute at AU\$6 and provides a 15-day money back guarantee. Also, it offers an option of 10 percent bulk order discount<sup>1</sup>. Clearly, a variety of pricing tools are used by the Australian providers in order to compete in the market.

Overall, as Able's capacity expands, it will become more important for it to grow the commercial services. Ultimately, it is about obtaining a stream of self-sustaining cashflows while maintaining fees that are attractive to advertisers. A copy of Able's financial statements for the year ended 30 June 2014 can be found at Exhibit 1.

<sup>1</sup> these charge-out rates are for captioning services on long-format programmes, which can be different to charge-out rates for commercials





SHORTLAND STREET

# Major stakeholders



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## NZ On Air

NZ On Air is an independent New Zealand broadcast funding agency. It is an autonomous Crown entity that is separate from central Government. Also, it is a major investor in television production mostly made by independent producers for free-to-air television channels.

Being the main body responsible for funding public-good broadcasting content across television, radio and new media platforms, NZ On Air has a particular focus on providing funds to television programmes that reflect and develop New Zealand identity and culture.

In terms of funding, all decisions are made in accordance with the New Zealand Broadcasting Act 1989 and in line with NZ On Air's investment strategy. For instance, it is required by the Broadcasting Act 1989 to ensure there is a range of television programmes that reflects and provides for the interests of "persons with disabilities, minorities in the community including ethnic minorities, the diverse religious and ethical beliefs of New Zealanders". As such, NZ On Air focuses its investment strategies on broadly three areas: (1) innovation and creativity in the funding submissions; (2) diversity of faces, stories and storytellers to reflect all New Zealanders and (3) value for money.

The CEO of NZ On Air suggests the level of public funding is expected to grow slowly over time. This can be seen as a good sign to Able, whose services are fully funded by NZ On Air under the Special Interest Genre. These special interest programmes reflect the lives of New Zealand's diverse cultural

communities and minority groups and most of the programmes would not have been made available without the public funding from NZ On Air. Therefore from NZ On Air's perspective, although these programmes may not offer high commercial values, they clearly possess high culture values which are worth promoting for the New Zealand community.

Currently, NZ On Air provides approximately \$2.4 million a year to Able on the basis that Able captions more than 250 hours of programmes each week and provides more than 20 hours a week of audio description. To ensure these funding criteria are met, Able provides NZ On Air with quarterly output reports that display the number of hours Able produces on both audio description and captioning, its financial expenditures and any new projects Able is currently undertaking. These performance reports will then be used as basis for Able to renew its funding annually with NZ On Air.

The fact that Able is fully dependent on NZ On Air makes its financial position vulnerable. Despite its good collaborative relationship with NZ On Air, under the current legislative structure, it is simply impossible for Able to obtain any funding guarantees beyond one year. Therefore, finding a self-sustaining source of funding is critical. Also, given Able's current funding structure, the level of funds that Able receives from NZ On Air will largely determine the volume of captioning and audio description services that Able can provide.



## TVNZ and MediaWorks

TVNZ and MediaWorks are Able's major customers that broadcast captioned and/or audio-described programmes. Once Able finishes adding captions on the television programmes, these two broadcasters will broadcast the programmes through the free-to-air channels, namely TV ONE, TV2, TV3 and FOUR to reach out to the deaf and hard-of-hearing community, providing them with access to media. However, Able only provides audio description service to TVNZ as TV ONE and TV2 are currently the only channels that are available for broadcasting audio described programmes.

### TVNZ

Being a government owned entity, TVNZ is New Zealand's largest national television broadcaster and digital media company. It operates six channels, namely TV ONE, TV2, TV ONE plus 1, TV2+1, TVNZ Heartland and TVNZ Kidzone 24. Through its two free-to-air channels, TV ONE and TV2, it captures 41.6 percent of the audience market share. TVNZ Heartland and TVNZ Kidzone 24 are the only two channels that are broadcast on

pay TV platforms such as SKY and IGLOO. TVNZ also operates TVNZ OnDemand and news website ONEnews.co.nz.

TVNZ broadcasts closed-captioning on TV ONE, TV2, TV ONE plus 1, TV 2+1 and TVNZ Heartland and audio description on TV ONE, TV2, TV ONE plus 1 and TV 2+1. The reason that not every programme is captioned or audio described is because only a selective number of channels / medial platforms such as the ones named here have the specialist equipment to broadcast captioned and audio described programmes. Additional infrastructure will have to be set up to enable other channels to broadcast those programmes.

### MediaWorks

MediaWorks is another major broadcaster in New Zealand which comprises leading New Zealand news and entertainment brands across television, radio and digital media. Through its two national channels, TV3 and FOUR, MediaWorks obtains a combined audience market share of approximately 15.5 percent.

## New Zealand's media platforms

In New Zealand, there are a few media platforms that provide captioned and audio described programmes such as Freeview, IGLOO, SKY Digital, MYSKY HDi, Tivo and My SKY.

### Freeview

Freeview is an organisation launched by New Zealand's leading free-to-air broadcasters TVNZ, MediaWorks, Maori Television and Radio New Zealand. It was established in response to the Government's decision to transition all free-to-air broadcasters from analogue to digital transmission. It currently has access to all of the major free-to-air channels including Prime, Te Reo and TV6, TV7 and other regional channels.

### SKY

SKY Digital, MYSKY HDi and MY SKY are all operated under SKY, a pre-eminent pay television broadcasting service provider in New Zealand. Under the agreements between the major broadcasters concerned, all the free-to-air television channels, namely TV ONE, TV2, TV3 and FOUR, are now available on SKY's digital satellite service. As at 30 June 2014, SKY's pay television services had a residential household penetration rate of approximately 48.7 percent and an audience market share of approximately 29.4 percent.

In December 2005, SKY launched My SKY, a hard-drive personal digital recorder. This allows subscribers to gain access to a MY SKY recorder after having paid a one-off installation fee. Subsequently in July 2008, SKY launched MYSKY HDi, a new high definition decoder and PVR with Dolby Digital surround sound, IPTV capability and increased storage.

### IGLOO

IGLOO is a New Zealand prepaid pay TV service founded by SKY and TVNZ. It is a low cost pay TV in New Zealand. The service is targeted at individuals who may not be able to commit to a contract or do not need all of the channels available from the regular Sky pay TV offering. It offers general entertainment channels such as TV One (selected HD), TV2 (selected HD), TVNZ Heartland, TVNZ Kidzone24, TV3 (selected HD), FOUR, BBC UKTV, Food Television and so on.

### PRIME

Prime is the second privately owned national free-to-air television broadcaster in New Zealand. Originally it was owned by Prime Television in Australia but it has now entered into a joint-venture agreement with NINE Entertainment Company (Nine Network Australia).

It airs a variety of programmes, largely imported from Australia, the United Kingdom and the United States. This includes free-to-air rugby union, cricket, netball and rugby league matches. Its analogue terrestrial signals cover 91 percent of the population and it is currently available on SKY Digital.



# Operating market







## The New Zealand market

### Market size

It is estimated that approximately 700,000 New Zealanders are considered hearing impaired and 125,000 are considered vision impaired. Hence, being the only captioning and audio description service provider targeted at these two communities, Able clearly has opportunities to capture more users and widen its service coverage.

### Media access

In light of Able's mission to provide more accessible media to the community, the level of usage for media access services is definitely a key consideration. Based on a recent search conducted by Able, 78 percent of all media services users make use of captioning services but only 11 percent use audio description services. Nevertheless, there is a relatively high degree of overlap (roughly 11 percent) between the user groups for both captioning and audio description services. In other words, 50 percent of audio description users also use captioning services.

Currently, Able captures around 60 percent of the deaf and hearing-impaired people and 53 percent of the blind and vision impaired people. Among the users who use captioning services, only around 29 percent are deaf or hearing impaired. Similarly, only around 20 percent of the users that use audio description service are blind or vision impaired. As a result, a strong demand for these services also stem from the wider community.

### Legal environment

Able is well positioned to capture the entire market and leverage plenty of growth opportunities, but at the same time, there are challenges as well as scope for new developments. For instance, there is currently no legislation in New Zealand that makes captioning mandatory. As a result, broadcasters in New Zealand are not required to provide any access services to the wider community. This situation is in contrast with the Australian market.

Media Access Australia is an organisation that has advocated for various policy statements and expectations to be put in place by the legal authority in respect of making captioning services mandatory for all television programmes. When digital broadcasting commenced in Australia in 2011, the Broadcasting Services Act 1999 stipulated that all channels that were broadcasting digitally had to caption all their news, programmes on current affairs and all other programmes from 6pm to 10.30pm (ie, during prime-time). Also, a series of arrangements were made between the Australian Human Rights Commission and Free TV Australia to further support that legal position. As a result, a significant level of captioning was observed during the period from 6pm to midnight and it reached almost 90 percent coverage by 2012. Then in June 2012, the Senate passed the Broadcasting Services Amendment (Improved Access to Television Services) Bill 2012 to amend the existing statute and made it a legal requirement that 100 percent of the prime-time programmes have to be captioned by

2015. However, there was an "escape clause". Based on the Bill, digital multi-channels only have to caption a programme if it is shown with captions on its parent channel. A review of this multi-channel regulation was due to take place before the end of 2012 but unfortunately it did not end up happening.

The market for audio description services presents a different market situation. Able is currently the only audio description service provider in New Zealand and it was launched in 2011. Although this single-player market seems a bit small and immature, there is a large discrepancy in the levels of services provided among the overseas markets. For example, Australia currently has no regular television audio description service provider and there is no policy or legislation for broadcasters to provide audio described programmes. In this regard, New Zealand's audio description services are in fact leading the way in Australasia.

On the contrary, the level of audio description is much higher in the United Kingdom, the United States and Canada. In the United Kingdom, since 2003 all broadcasters have been working towards at least ten percent of audio described programmes, with many channels providing more than this. In the United States, major networks and cable stations have been broadcasting at least seven hours of audio described programmes per week following legislation that was passed in 2010.

Without a doubt, more stringent legal requirements can open up more opportunities for Able in terms of widening its captioning coverage but things are still up in the air when it comes to legislative reforms. Ms Youens believes that legislative changes in the near future might be a challenge but given the robust legislative environment in Australia, the United Kingdom and the United States, it is not impossible for New Zealand to follow these footsteps in the future. Ms Youens said: "Able needs to be aware of the legislative environment and have a long-term plan in place to make sure we are in the best operational position to deal with the extra workload and be the preferred supplier for the broadcasters."

On another note, given New Zealand's obligation under the Universal Declaration of Human Rights, Able's basic audio description and captioning services will always be provided free of charge. However, there is a possibility that Able could charge for new, additional services in the future.

Overall, more stringent legal requirements can lead to growth opportunities and operational threats. This is because once the policy statements and legal requirements are put in place, Able will be positioned to take on all the contracts for New Zealand television. However, at the same, the market will become more attractive to overseas players. Once Australian, English or other providers decide to enter the New Zealand market, Able may be easily overshadowed by these large and more established overseas companies.

# Challenges and opportunities



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## Potential improvements

Ever since Able became a stand-alone organisation, it has committed a considerable amount of effort to ensure its services are the highest quality and the business is operating in the most efficient manner. In particular, Able focuses on leveraging new technological advances to increase its efficiency and productivity within its funding capacity.

A recent survey conducted by Able revealed that customers are anxious to see an increased volume of captioned and audio described programmes being broadcast across different television channels. Statistically speaking [Exhibit 2], around 40 percent of the users would like to see more captioned programmes being broadcast on different channels and around 30 percent have expressed a similar wish to see more channels with audio description services incorporated. People have also expressed wishes to see some captioned and audio described programmes broadcasted on TV3 and more shows with audio description and live captioning incorporated. In this regard, Able has been looking to develop a business relationship with PRIME and provide captioning for live news on TV3 (which has not been done currently).

In light of the interest for captioned and audio describe programmes, Able is clearly not short of market demand. In fact, around ten percent of the New Zealand population, not just limited to the vision and hearing impaired communities, have had some experience using the services that Able provides. Consequently, the question now is how should Able exploit the market demand so that it can effectively widen its service coverage and capture more users. For other potential areas of improvements, please refer to Exhibit 2.

## Marketing

Able is currently spending less than one percent of its operating budget on marketing [Exhibit 3]. However, based on the recent findings, Ms Youens has expressed her view on making changes to the existing marketing strategy and is looking to implement a new series of marketing initiatives in order to address the issues discovered in the research report.

Firstly, the research revealed a number of perceived barriers that are preventing the general community from using captioning and audio description [Exhibit 2]. For example, of those that were surveyed, more than 60 percent were not aware of the services that Able provides. Also, many viewers don't know what channels and/or shows are available for captioning and audio description and they often have technical issues turning on the services on their televisions.

Secondly, many people cannot see the relevance of captioning to their daily lives and often find it too difficult to set up the audio description service at home. The survey, in particular, has collated information on the level of difficulty and user-friendliness in utilising these services [Exhibit 2]. Currently, Able provides instructions on its website to help viewers configure their television settings and turn on the captioning and audio description services. They can also contact their subscribed broadcasters for technical support.

Another issue that was raised is that, in this technologically advanced world, many people have deviated from their reliance on television programmes and shifted their focus to the internet. Television now plays a much less important role in people's lives. Even for those who still enjoy watching television, they often find the channels they like are not equipped with the facility to broadcast audio-described programmes.

Lastly, in contrast with the 52 percent daily usage rate of audio description services, there is around 82 percent daily usage rate of captioning. This result reveals the trend that captioning services are not necessarily being used by only the hearing impaired group. People who have language needs or for various other reasons do not wish to turn on the volume on their televisions are also interested in Able's captioning services. Likewise, this result further supports the fact that only around 29 percent of captioning services users are deaf or hearing impaired and only around 20 percent of the audio description users are blind vision impaired. Consequently, Able can potentially target the wider community in order to increase its service coverage. For more information, please refer to "Reasons for using each services" in Exhibit 2.



## Funding

Able's team is often asked questions such as "Why isn't every programme captioned or audio described?" and "Why isn't every channel captioned or audio described?" The answers are simple. Firstly, the four free-to-air-channels are currently the only ones that have specialist equipment to broadcast captioned and audio described programmes. Secondly, and most importantly, Able has a limited level of funding which forces it to be selective when choosing programmes that it provides

services for. Consequently, in order to increase the volume of services that Able provides, additional funding will be required.

The table below provides a guideline on Able's captioning service coverage on these free-to-air channels for the 2013/2014 period. For example, the first row shows that Able currently captions 100 percent of the prime time on TV One and 49 percent of all the programmes on TV ONE.

Captioning service coverage	Prime time (6pm-10pm)	Total coverage
TV ONE	100%	49%
TV2	100%	73%
TV3	51%	22%
FOUR	44%	10%
TV ONE & TV2	100%	61%
TV ONE, TV2, TV3	84%	48%

Given that Able is still in the early stage of development, any additional funding (in addition to the \$2.4 million from NZ On Air) could be used to expand coverage. As a general guideline:

- \$1.2 million extra funding is needed to caption 100 percent of prime time programmes on TV ONE, TV2, TV3 FOUR and Prime.
- \$900,000 is needed to caption 100 percent of children's programming on TV2 and FOUR.
- \$1m is needed to increase audio described programmes and caption all NZ On Air funded content that is broadcasted on TV ONE, TV2, TV3, Prime and Maori TV

## Going forward

It has been a year since Able started operating as a stand-alone non-for-profit organisation. Able is excited about the opportunity to grow independently and offer high quality services to the wider community. However, being the sole player in this field, Able is confronted with a market that is full of opportunities as well as challenges.



# Appendix

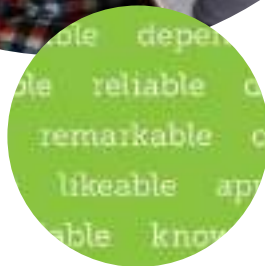
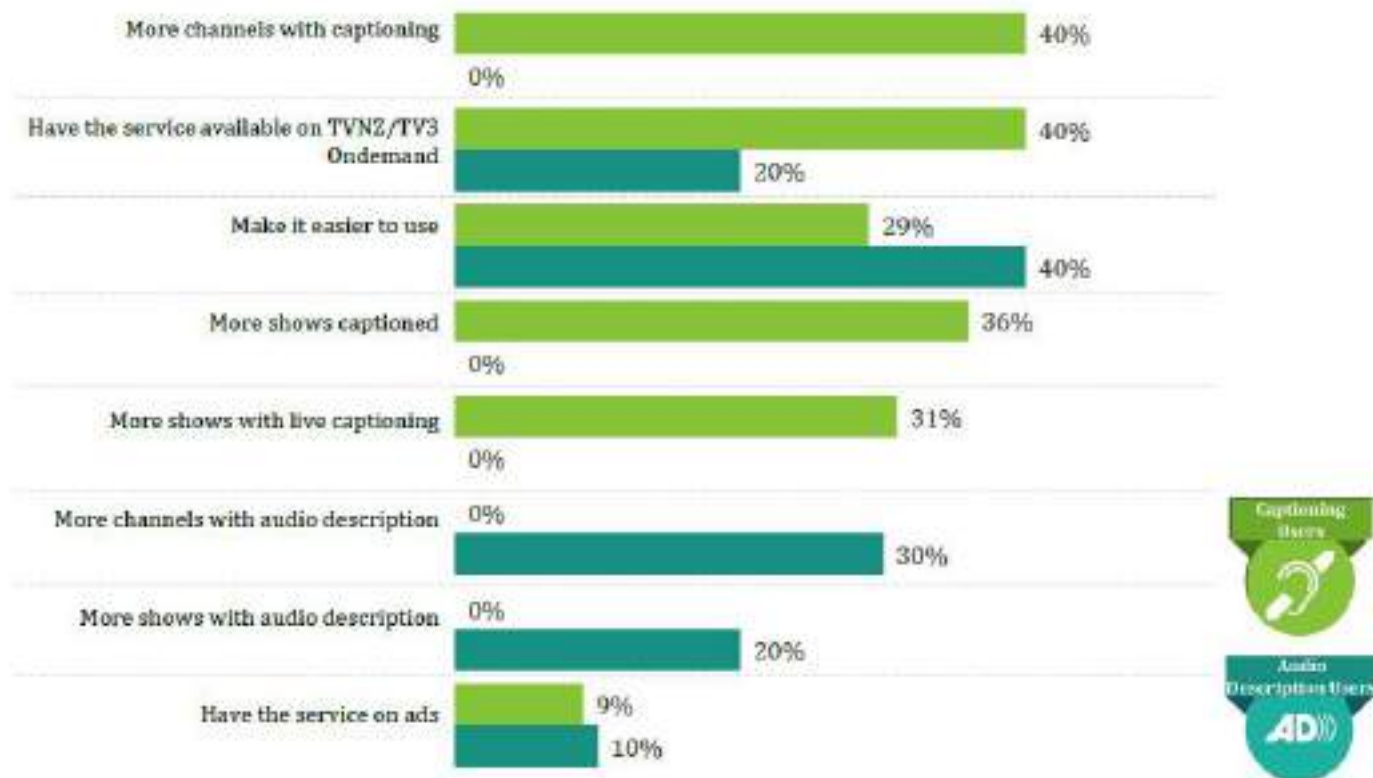




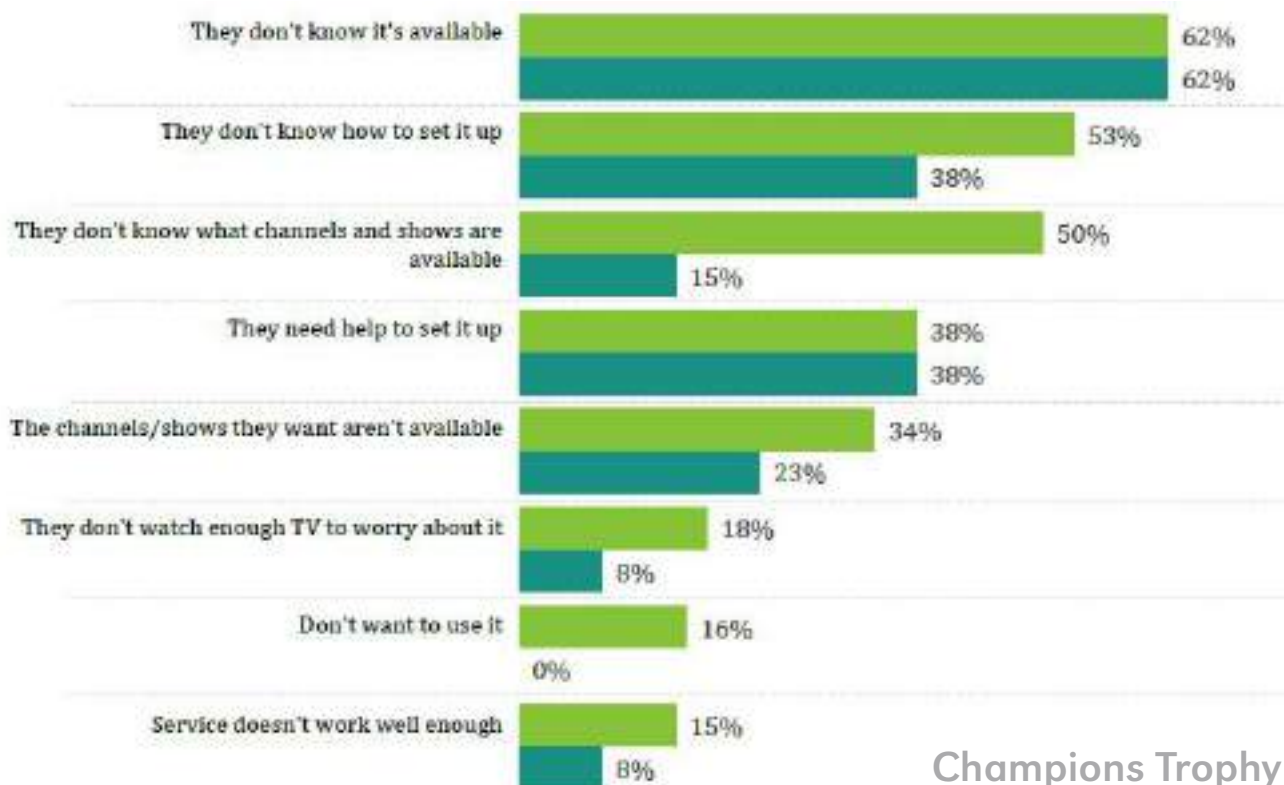


Exhibit 2: Market research

List of improvements that people would like to see

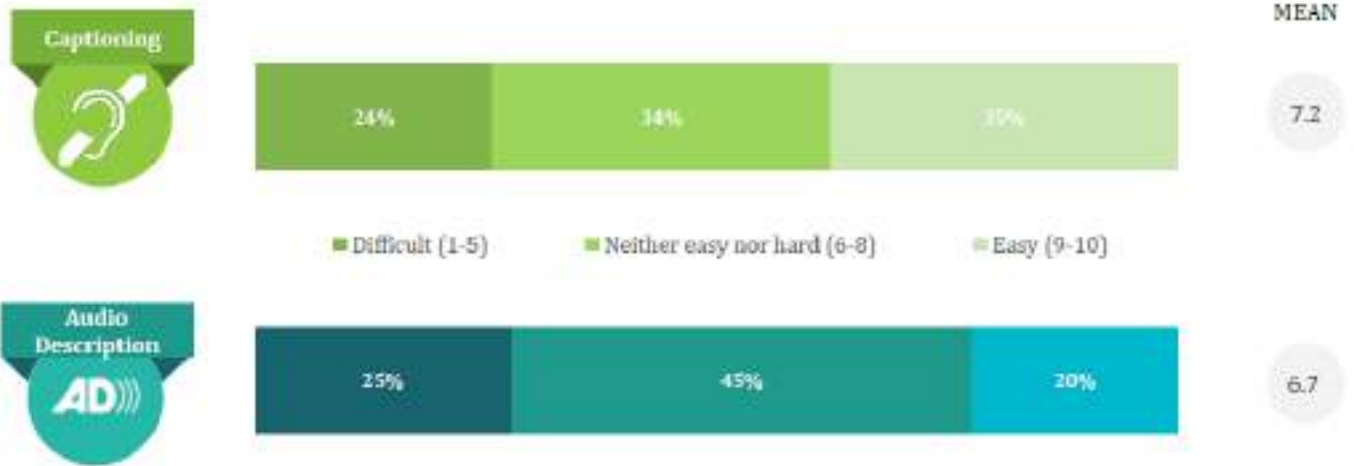


Perceived barriers for people using services more often

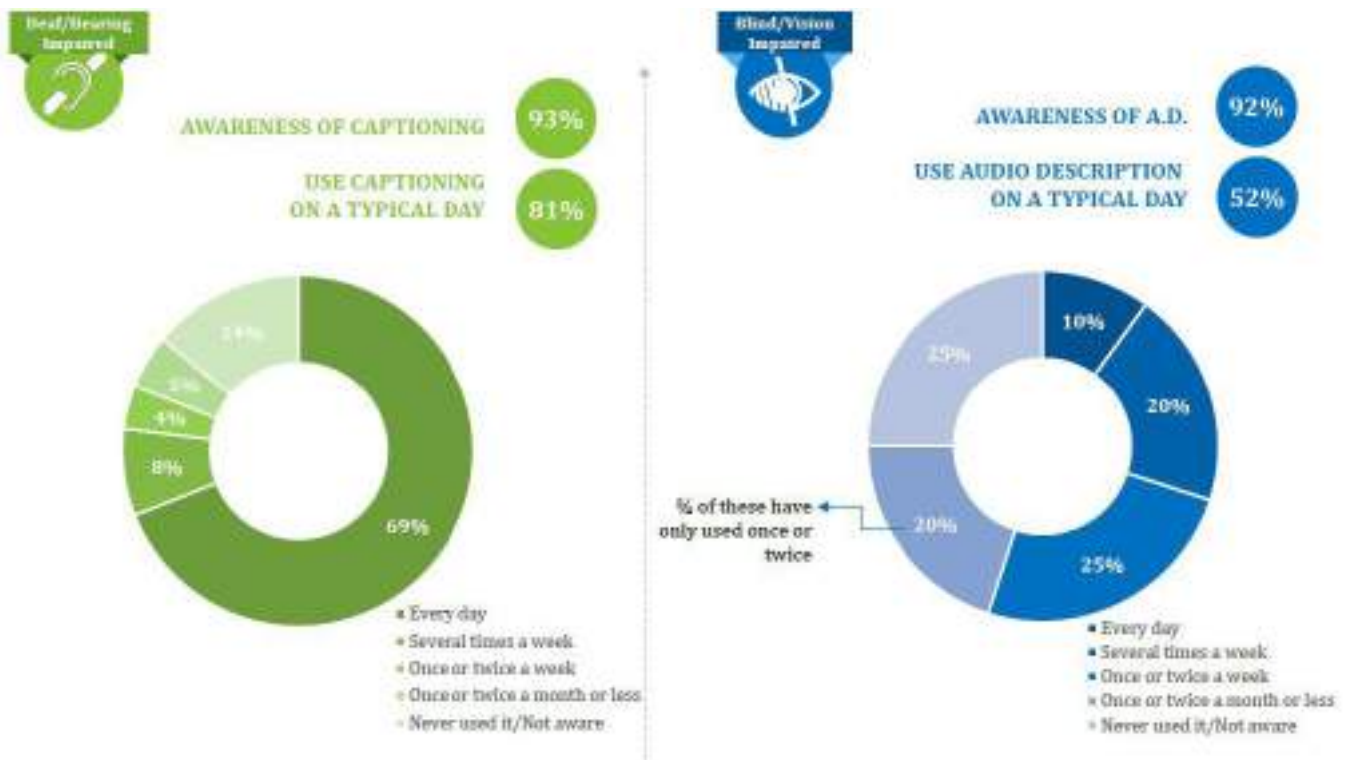




## How easy it was to learn how to use



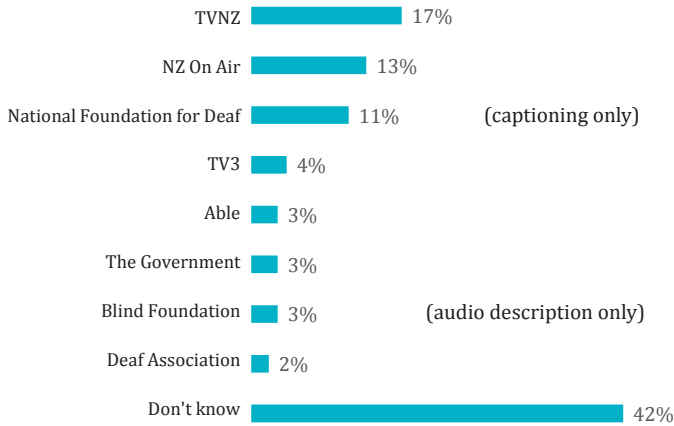
## Awareness and use of media services



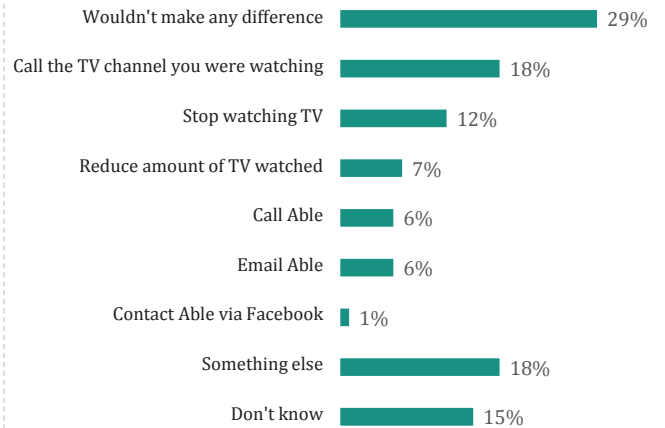


## Reasons for using each service (based on regular users)

### Awareness of organisation who runs services

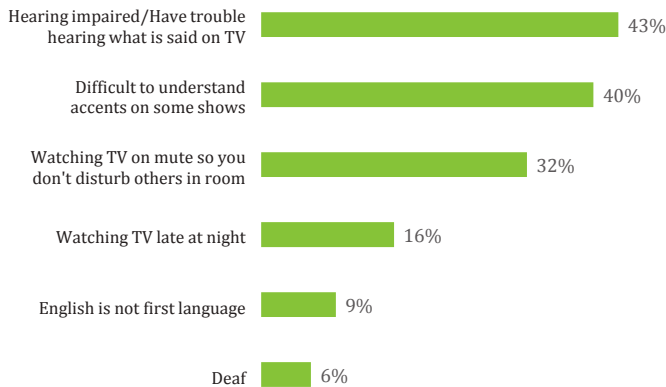


### What would users do if a problem occurred



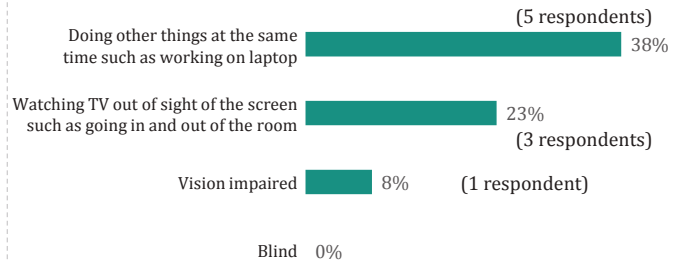
## Reasons for using each service (based on regular users)

### Captioning



Just 29% of Captioning users said they were deaf or hearing impaired

### Audio Description\*

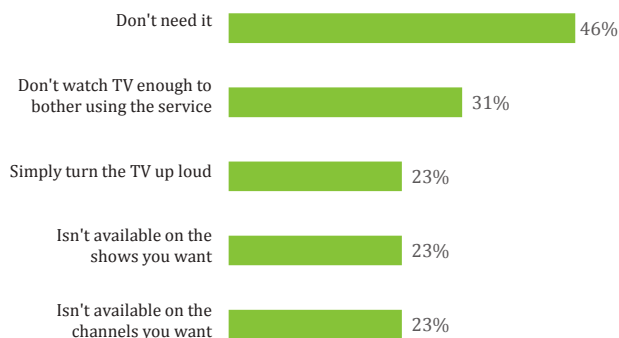


Just 20% of Audio Description users said they were blind or vision impaired

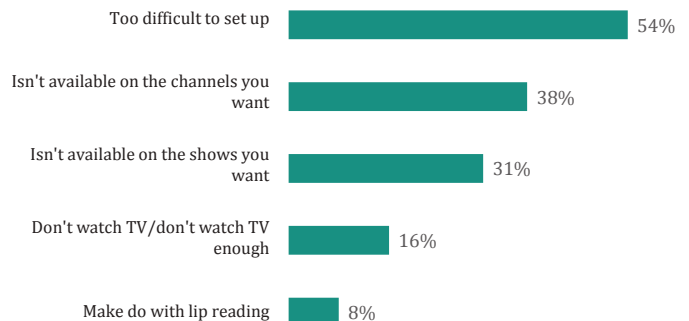
## Reasons against using media services

### AGAINST

### Captioning\*



### Audio Description\*



#### Plus "Other" responses:

- Lack of accessible TV generally, like no talking set-top box to indicate channel
- Issues with some decoders needing resetting every time you change channels
- Able should setup email list of programmes each week that people could subscribe to



**Exhibit 3: Financial budgets**









### Examples of caption and audio described TV listings




"Find out which programmes are audio described on TV One and TV2"



### Wednesday — December 10th

Time	Programme Name	Duration	Channel
12:00	Shortland Street	30 mins	TV Two 
13:30	Coronation Street	30 mins	TV One 
19:00	Shortland Street	30 mins	TV Two 
19:30	Two Weeks Notice	120 mins	TV Two 

### Thursday — December 11th

Time	Programme Name	Duration	Channel
12:00	Shortland Street	30 mins	TV Two 
13:30	Coronation Street	30 mins	TV One 
19:00	Shortland Street	60 mins	TV Two 
21:40	Miranda	70 mins	TV One 



"Find out which programmes are audio described on TV One, TV2 and TV3 and FOUR"



Wednesday — December 10th

Time	Programme Name	Duration	Channel
0:05	Artcade Awards 2014	75 mins	TV One
1:30	Private Practice	35 mins	TV Two
4:30	Matthew & Marc's Rocky Road To Bollywood	25 mins	TV Two
4:55	Regular Show	30 mins	TV Two
5:05	Neighbours	25 mins	TV Two
8:30	T&I Tour	25 mins	TV Two
9:55	My Little Pony Friendship Is Magic	25 mins	TV Two
7:20	Scooby-Do! Mystery Incorporated	30 mins	TV Two
7:50	Shogunza	25 mins	TV Two
8:15	Few Patrol	25 mins	TV Two
8:30	Chuggington	30 mins	TV Four
8:40	Flanagan Sam	20 mins	TV Two
10:00	The Ellen DeGeneres Show	60 mins	TV One
11:00	The Chase	60 mins	TV One
11:00	Neighbours	30 mins	TV Two
11:30	Home and Away	30 mins	TV Two
12:00	ONE News at Midday	30 mins	TV One
12:00	Shortland Street	30 mins	TV Two
12:30	Emmerdale	60 mins	TV One
13:30	Coronation Street	30 mins	TV One
14:00	Packed To The Rafters	60 mins	TV One
15:00	According To Jim	30 mins	TV Two
15:30	SpongeBob Squarepants	30 mins	TV Two
16:00	Austin & Ally	30 mins	TV Two
16:25	The Chase	60 mins	TV One

16:25	The Chase	60 mins	TV One
16:30	The Ellen DeGeneres Show	60 mins	TV Two
16:30	The Simpsons	30 mins	TV Three
17:20	Millionsaire Hot Seat	30 mins	TV One
17:30	Home and Away	30 mins	TV Two
18:00	ONE News At 6pm	60 mins	TV One
18:00	Friends	30 mins	TV Two
18:00	The Nanny	30 mins	TV Four
18:30	Neighbours	30 mins	TV Two
19:00	Seven Sharp	30 mins	TV One
19:00	Shortland Street	30 mins	TV Two
19:00	The Simpsons	60 mins	TV Four
19:30	Masterchef Australia	65 mins	TV One
19:30	Two Weeks Notice	125 mins	TV Two
19:30	The Block: Glasshouse	70 mins	TV Three
20:35	Autopsy	60 mins	TV One
20:40	3rd Degree	60 mins	TV Three
21:35	Louis Theroux: La Strada	75 mins	TV One
21:35	Kitchen Nightmares	60 mins	TV Two
21:40	Gang Related	35 mins	TV Three
22:35	Devilish Maids	32 mins	TV Two
22:50	ONE News Tonight	30 mins	TV One
23:05	NCIS: Los Angeles	60 mins	TV Three
23:10	Offspring	60 mins	TV One
23:25	The Inbetweeners	35 mins	TV Two



## Selected news articles

### Deaf community will be able to follow live election coverage.

1 September 2014, INsite

**The deaf and hard of hearing will be able to follow this year's election thanks to New Zealand's captioning and audio description service, Able. The NZ On Air-funded company announced that it will be captioning all political debates and live election coverage on TV ONE.**

Coverage will include all political debates and election night coverage on TV ONE, as well as ONE News at Midday, ONE News at 6pm, Seven Sharp, ONE News Tonight, Sunday's Q+A, and Sunday's repeat of The Nation on TV3. All captioning is free and easy to use throughout New Zealand.

Chief Executive of Deaf Aotearoa Lachlan Keating says that Able's captioning of election coverage is a fantastic asset to those in the Deaf community who want to stay fully involved in the political process.

"For many New Zealanders, watching political debates is the way they get a better understanding of policies and engage with the political process. Captioning allows the Deaf community to have improved access to this, which is fantastic."



The first leaders' debate on 28 August was the first to be covered, with a team of specialist live re-speakers using voice recognition software to caption the coverage. Preparation included compiling wordlists of candidates' names, electorates and major issues.

"We take election captioning very seriously and want to ensure that Deaf and hard of hearing people are able to access the most accurate representation of the coverage possible," says Wendy Youens, Chief Executive of Able.

"Although with the nature of live captioning we do have to summarise what takes place in live coverage, our training ensures that all captioners are familiar with the people, issues and places involved with this election in order to provide Deaf and hard of hearing people with the best access possible."





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