WHERE ARE THE AUDIENCES?
2023

SEPTEMBER 2023

Irirangi Te Motu
NZ On Air

Glasshouse

Contents

Introduction

New Zealand On Air (NZ On Air) supports and funds public media content for New Zealand audiences, focussing on authentic NZ stories and songs that reflect New Zealand's cultural identity and help build social cohesion, inclusion and connection.

It is therefore essential NZ On Air has an accurate understanding of the evolving media behaviour of NZ audiences.

The Where Are The Audiences? study (WATA) delivers an objective measure of NZ audience behaviour at a time when continuous single source audience measurement is still in development.

This document presents the findings of the 2023 study. This is the sixth wave of the study since the benchmark in 2014 and provides not only a snapshot of current audience behaviour but also how behaviour is evolving over time.

NZ On Air aims to hold a mirror up to New Zealand and its people. The 2023 Where Are The Audiences? study will contribute to this goal by:

- Informing NZ On Air's content and platform strategy as well as the assessment of specific content proposals.
- Positioning NZ On Air as a knowledge leader with stakeholders.
- Maintaining NZ On Air's platform neutral approach to funding and support, and ensuring decisions are based on objective, single source, multi-media audience information.

Research Approach

The first priority in the design and conduct of the WATA study is to ensure valid and robust comparisons to previous studies. Therefore the research approach, including methodology, sampling and respondent definition, question flow and wording, and weighting factors have been kept consistent with all previous WATA studies.

This includes the key technique of asking respondents about their behaviour "yesterday" within specific time periods between 6am and midnight. This technique enables the development of accurate survey based measures of actual behaviour by grounding responses in behaviour that is fresh in respondents' minds and within specific parts of an actual day.

This results in daily reach being the key audience metric in this study.

A total sample of n=1,408 was developed, with representative samples created for each day of the week so that results can be accurately extrapolated to represent a "typical" day.

The total sample has a maximum margin for error of +/-2.6%.

The results in this study will not exactly match data from sources such as TV ratings, radio surveys, or online analytics as the methodologies are different. However this study does provide an objective, single source comparison across all media.

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Research Approach

As in all previous studies, a mixed methodology of telephone and online interviewing was used:

- N=801 interviews were completed by telephone using random digit dialling and n=607 interviews were completed online in homes without a landline using Consumer Link's Flybuys research panel. The online interviews were conducted among New Zealanders without access to a home landline.
- Interviewing was conducted between April 17 and May 13.
- Respondents were defined as all New Zealanders aged 15 and over.
- Regional sample stratification and minimum quotas for males, 15-24 year olds and ethnic groups were implemented.
- The total sample has been post-weighted by access to a landline*, gender, age and ethnicity to ensure it is representative of the 15+ NZ population.

The study measured media consumed "yesterday", for how long and which channels, stations and sites were used. This approach measured the daily audience behaviour of the main broadcast, print, online and music media and forms the bulk of this report.

Respondents were also asked about how they use on demand, how they become aware of new TV shows, their use of captioning and audio description, and sources of music discovery.

Two key aspects were not included in this or previous studies;

- Device used to consume media. (Ownership and access to devices was collected.)
- Simultaneous media consumption

*Source: Incidence of homes without a landline based on Nielsen CMI Q1-Q4 2022

Changes made to the approach in 2023

The questionnaire for each measure of the WATA study is always updated to reflect changes in branding of specific channels, sites and stations, and to introduce or remove channels, sites and stations as necessary.

In 2023 the only other significant change was to merge the two separate SVOD media categories of overseas and NZ-based providers in to one overall SVOD category. It is possible this change could lead to fewer respondents selecting SVOD overall but the change needed to be made to better reflect the media environment in 2023.

- The previous two separate SVOD categories were a legacy of when the study launched in 2014 when there were no NZ based SVOD providers and users needed to use a VPN to access SVOD services.

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Abbreviations used in charts

Abbreviation	Media Type
TV Total	All (net) Linear TV viewing
Radio	Live NZ Radio
OS Online Video (new 2021)	International online Video e.g. YouTube, Facebook
NZ Online Video (new 2021)	NZ online video e.g. NZ Herald, Stuff
SVOD	Subscription Video On Demand e.g. Netflix, Disney Plus
TV Pay	TV viewing via pay TV platform (ie. SKY TV)
TV FTA	TV viewing via free to air platform
Music	Music on physical formats and non-streaming (eg. iPod, CDs)

Abbreviation	Media Type
Music Stream	Music online/streamed (e.g. YouTube, Spotify)
Online Radio	Online NZ radio
NZ OD	NZ on demand sites
Newspaper	Newspaper reading (including online)
Magazine	Magazine reading (including online)
Spotify	Listen to music on Spotify
Podcasts	Listen to podcasts

01

KEY INSIGHTS & SUMMARY

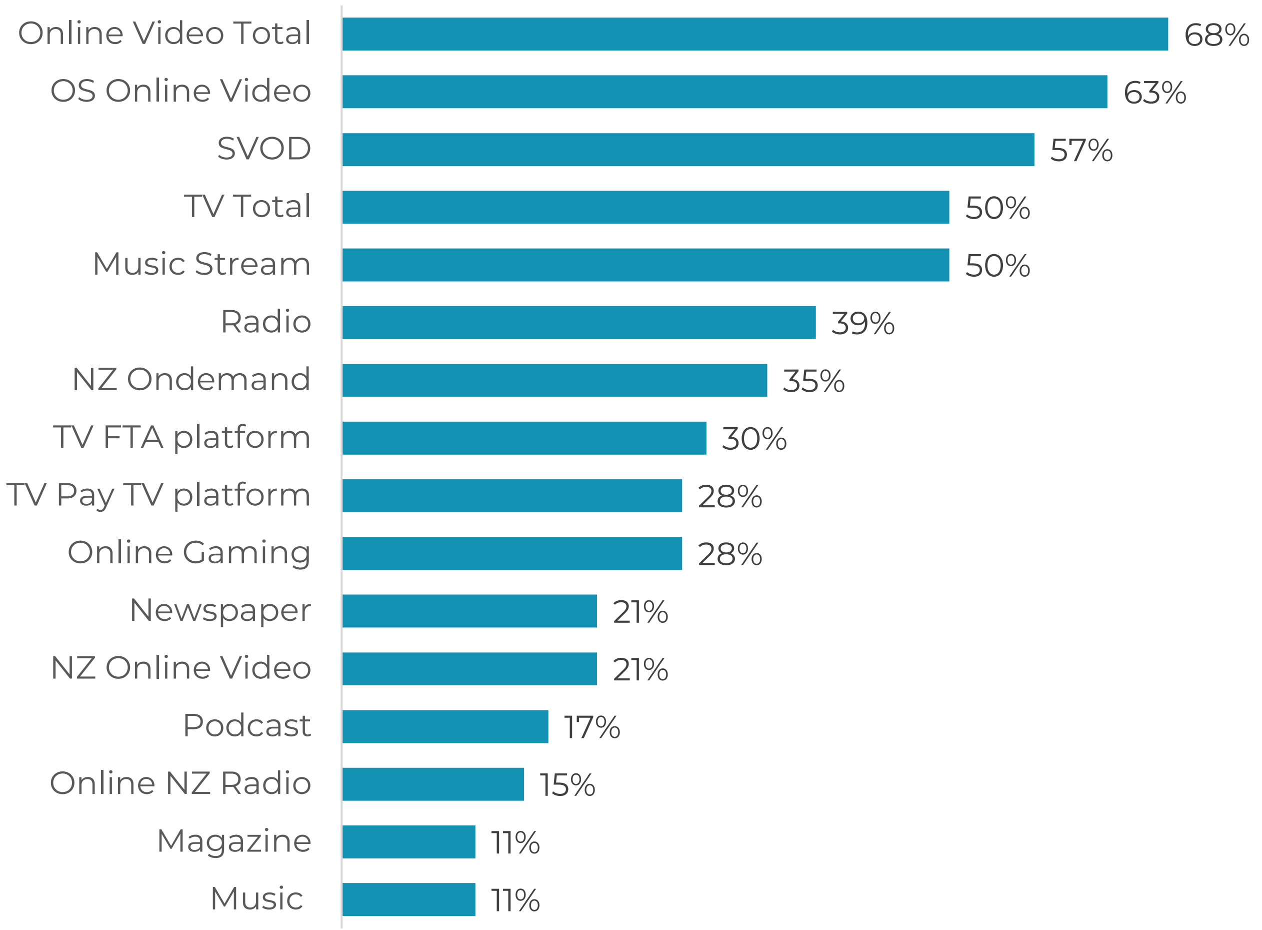
Key Insights

1. All digital media show audience growth after a pause in 2021 potentially related to lockdown. There is now a clear gap between the daily audiences watching overseas online video and SVOD, and TV audiences. The daily reach of streamed music has also overtaken radio listening.
2. All traditional media continue to show consistently declining audiences, with TV no longer attracting the biggest audiences during its traditional peak time of 6-10.30pm.
3. For the first time the study is showing significant declines in traditional media use among 60+ year olds, and 40-59 year olds are now at the cross-over point where digital media audiences overtake traditional media.
4. 2023 also represents the cross-over point when New Zealanders overall start to spend more time using digital media than traditional media.
5. On demand shows the strongest acceleration of audience growth of any media since 2021. It now attracts the fourth biggest audience between 6-8.30pm and is now mainly used as a primary source of content rather than a catch up service. The profile of on demand viewers has also changed significantly since 2021, now reaching more older, though lighter, viewers.
6. In 2023 age is the only consistently strong differentiator of media behaviour, with ethnicity, gender, socio-economic level becoming less influential. However the impact of age is also diminishing as digital media audiences grow and become broader.
7. Stuff is the most widely used source of news & information but TVNZ remains the most trusted.

Daily reach 2023

- All New Zealanders 15+
- % Daily Reach

In 2023 online video attracts the biggest audience each day, reaching nearly seven in ten New Zealanders each day. This is driven by watching overseas online video. SVOD attracts the second biggest audience with nearly six in ten watching each day, while TV and music streaming reach one in two. Below this, broadcast radio and on demand reach just under four in ten each day.



Base: All New Zealanders 15+:
(2023 n=1,408)

Note: TV viewing includes live and time shifted viewing , in and out of home. TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content. TV FTA refers to all TV viewing via a free to air platform.

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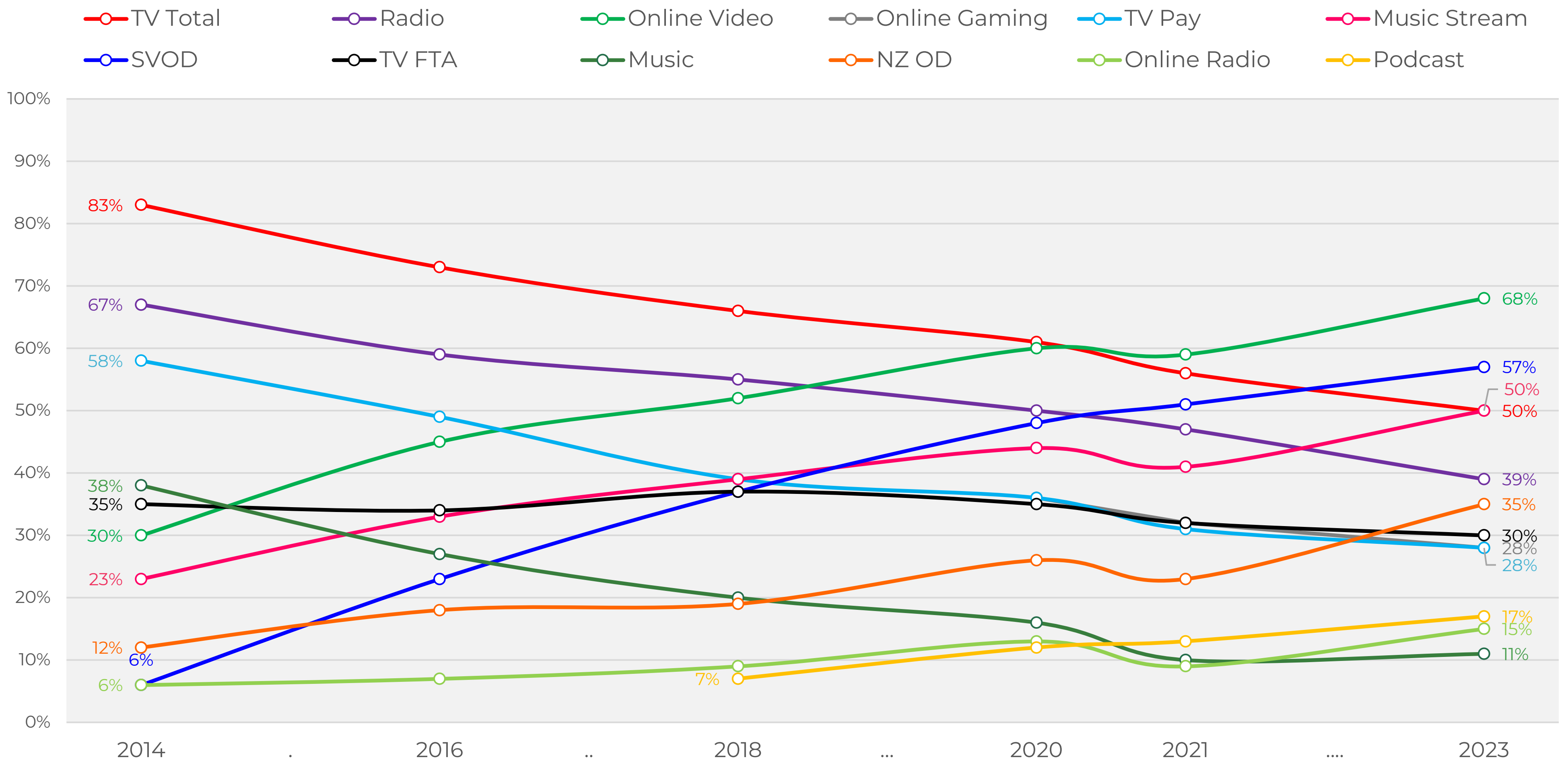
Daily reach over time

- All New Zealanders 15+
- % Daily Reach

Following stability of digital media audiences in 2021, perhaps influenced by lockdown behaviour, all digital media show significant growth in 2023 with on demand audiences growing the most. TV and broadcast radio show the same rate of audience decline in 2023 as previous waves of the study. Unlike 2021 when the decline of traditional media drove the increasing gap to digital media, the increasing dominance of digital media is now equally driven by the growth of these media.



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Overall audience trends

The 2020 WATA study suggested that was the cross-over point when audiences using digital media overtook traditional media. The 2021 study confirmed that, but the pause in growth of digital media meant there was still relative parity between the two. However the return of significant growth in digital media audiences in 2023 results in digital media audiences starting to be significantly larger than traditional media overall.

- Over the course of the WATA studies since 2014 the daily audience watching TV via a free to air platform has been mainly stable. While this audience does show a slight decline in 2023, the bigger driver of declining TV audiences continues to be fewer viewers watching via a pay TV platform.
  - In 2023 just 28% of New Zealanders have daily access to SKY TV – down from 30% in 2021 and 57% in 2014.
- Listening to music on physical formats is the only traditional media to not show a decline in audience size since 2021.
- All digital media show significant audience growth since 2021 – at the same growth rate seen in pre-2021 studies.
- The daily reach of radio has been overtaken by streamed music since 2021.
- On demand viewing shows the biggest increase in audience growth rate of any digital media – up from 23% daily reach in 2021 to 35% in 2023
  - There is evidence in the data to suggest this growth is coming from all other media rather than cannibalising TV audiences.

Audience behaviour over the day

Not only does online video attract the biggest audience overall, it now attracts the biggest or equal biggest audience during all parts of the day. Most notably TV no longer attracts the biggest audience during its traditional peak time of 6-10.30pm.

- Compared to 2021, online video now reaches a significantly bigger audience during the day between 6am-6pm and is the dominant media during this time.
- Between 6-8.30pm three media (online video, SVOD and TV) attract similar size audiences with just over one in three New Zealanders watching these media during this time.
- After 8.30pm all media decline in reach, but SVOD and online video attract the biggest audiences, reaching three in ten New Zealanders, while TV declines below these media.
- On demand viewing shows both significant growth and change in audience behaviour since 2021. This media now shows a distinct peak in viewing between 6-8.30pm when it attracts the fourth biggest audience with more than one in five New Zealanders tuning in.
- Radio reaches fewer New Zealanders in the morning, and streamed music is now more popular to listen to between 6-9am.

Time spent using media

While 2020 was the cross-over point between digital and traditional media in terms of audience sizes, in 2023 New Zealanders are at the cross-over point of dedicating more time to digital media than to traditional media each day.

- New Zealanders now spend the same amount of time (just over 90 minutes) watching online video, SVOD and TV each day. This reflects both the ongoing decline in time spent watching TV (down from 118 minutes in 2021) and the consistent significant increase in time spent watching online video and SVOD.
  - The decline in time spent watching TV is driven by less viewing on both a free to air and pay TV platform.
- Similarly New Zealanders now spend more time listening to streamed music (just over an hour) than listening to the radio (just under an hour) each day.
- However the biggest increase in growth rate of any media is again the time New Zealanders spend watching on demand – up to 41 minutes in 2023 from 23 minutes in 2021.

Note: Time spent is based on all New Zealanders and therefore includes those who did not use each media (ie. includes zero minutes)

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Level of engagement with media

Among only the users of each media, TV continues to drive the highest level of engagement of any media in 2023 with viewers dedicating more than three hours to watching TV each day. SVOD generates the second highest levels of engagement at slightly less than three hours each day. Ongoing trends over time suggest this ranking may change by the time of the next WATA study.

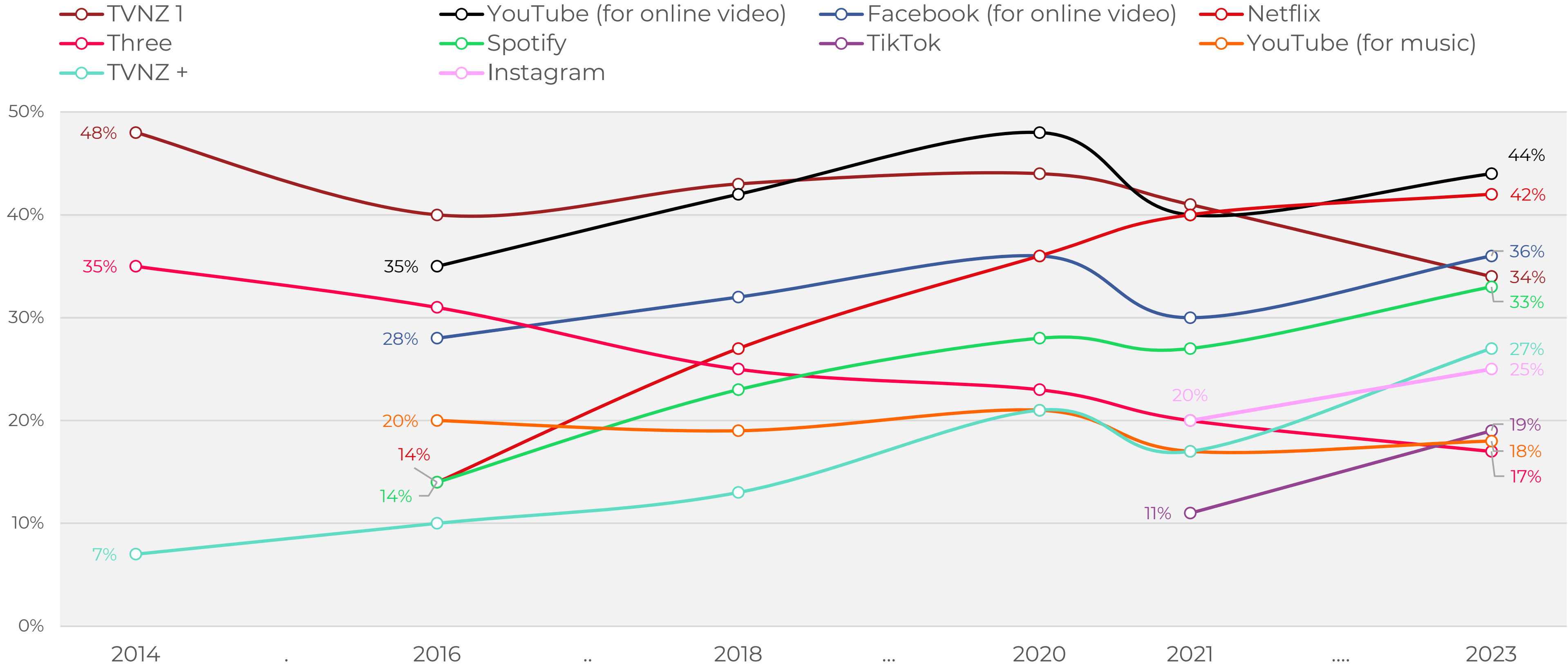
- Trends show TV not only losing audience size but also declining engagement among viewers. Previously this decline was driven by viewers on a pay TV platform, but in 2023 engagement has fallen for the first time among those who watch TV via a free to air platform.
- SVOD engagement is stable in 2023 but levels of engagement with online video continue to show strong growth, suggesting it could over-take at least SVOD in the future.
- While on demand has shown the most significant growth in both overall audience size and time spent, levels of engagement among viewers have actually decreased since 2021. This indicates that on demand audience growth has come from lighter viewers of on demand,

Note: Engagement is based on time spent among all users of each media and therefore excludes those who did not use each media (ie. excludes zero minutes)

Most popular channels, sites and stations

- All New Zealanders 15+
- Daily reach %
- Providers with 15% reach or more

YouTube (for video) and Netflix are the content providers who attract the biggest audiences each day with just over four in ten New Zealanders watching each day. TVNZ 1's decline sees Facebook (for video) become the third most popular provider, narrowly ahead of Spotify – all three reach about one in three New Zealanders each day. TVNZ 2 has dropped below 15%, and TikTok's growth results in nearly one in five New Zealanders using this site each day.



NEXT TIER:

Disney Plus	Stuff / Play Stuff	TVNZ 2	Snapchat	NZ Herald (video)	Amazon Prime
14%	12%	11%	11%	10%	10%

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q: Which of the following did you use yesterday?

Daily reach of specific channels, sites and stations

Online video sites - overseas

- Nearly all overseas online video sites show growth after a slight decline in 2021.
- YouTube (for video) remains the most popular overseas site, now reaching more than four in ten New Zealanders each day (44% reach) with Facebook (for video) below this at 36%.
- TikTok has almost doubled its daily audience since 2021 to 19% daily reach.

Online video sites – NZ based

- Compared to other digital media there has been little change in audiences watching online video on NZ based sites since 2021.
- Stuff (12%) and NZ Herald (10%) continue to be most popular and reach about one in ten New Zealanders each day.

Daily reach of specific channels, sites and stations

TV

- Just five TV channels now reach 5% or more New Zealanders each day, with many of the most popular channels declining in audience size since 2021.
- TVNZ 1 remains the most popular TV channel, reaching one in three New Zealanders each day (36%).
- Three reaches the second biggest audience with 17% watching this channel each day.
- TVNZ 2 reaches one in ten New Zealanders each day (11%).

SVOD

- Netflix is the most popular SVOD provider by a significant margin and continues to grow its daily audience – now reaching more than four in ten New Zealanders (42%) each day.
- All other SVOD providers have also grown their audience since 2021, but daily reach remains significantly lower than Netflix.
- Disney Plus is the second most popular SVOD provider, reaching 14% of New Zealanders each day.

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Daily reach of specific channels, sites and stations

On demand

- TVNZ+ dominates daily on demand viewing among New Zealanders and it has significantly grown its audience from 17% daily reach in 2021 to more than one in four New Zealanders in 2023 (27%).
- All other on demand sites have also grown their audience since 2021 but the gap in audience size to TVNZ+ has increased in 2023.
- The second most popular on demand site is ThreeNOW – reaching 7% of New Zealanders each day.

Summarising the changes in on demand audiences since 2021:

- Shows the fastest growing daily audience of any media since 2021 (from 23% to 35% daily reach), and now the fourth most popular media between 6-8.30pm.
- Now used more as a primary source of content (42% of users) rather than a catch-up service (31%), and therefore more influential as a source of new NZ made TV shows.
- The profile of this audience has broadened and counters the usual generation gap in digital media use with 40-59s the most likely to use on demand, 60+ year olds use it in line with overall daily reach and under 30's are slightly less likely to use on demand.
- However the new audiences attracted to on demand since 2021 tend to be lighter viewers, decreasing overall engagement.

Daily reach of specific channels, sites and stations

Streamed music

- Spotify continues to grow its daily audience among New Zealanders with one in three (33%) now listening each day.
- YouTube (for music) is second most popular but its daily audience is stable at 18%.
- Streaming services are now clearly the most common source of new music over radio stations with 53% of New Zealanders finding new music in this way, compared to 47% who find new music through the radio.

Radio

- Apart from slight growth in the audiences listening to More FM (6%) and The Hits (4%), all radio stations show declines in daily reach since 2021.
- RNZ National remains the most popular station with just under one in ten (8%) tuning in.
- Newstalk ZB attracts the second biggest audience each day with 7% daily reach.

Differentiating factors in media usage

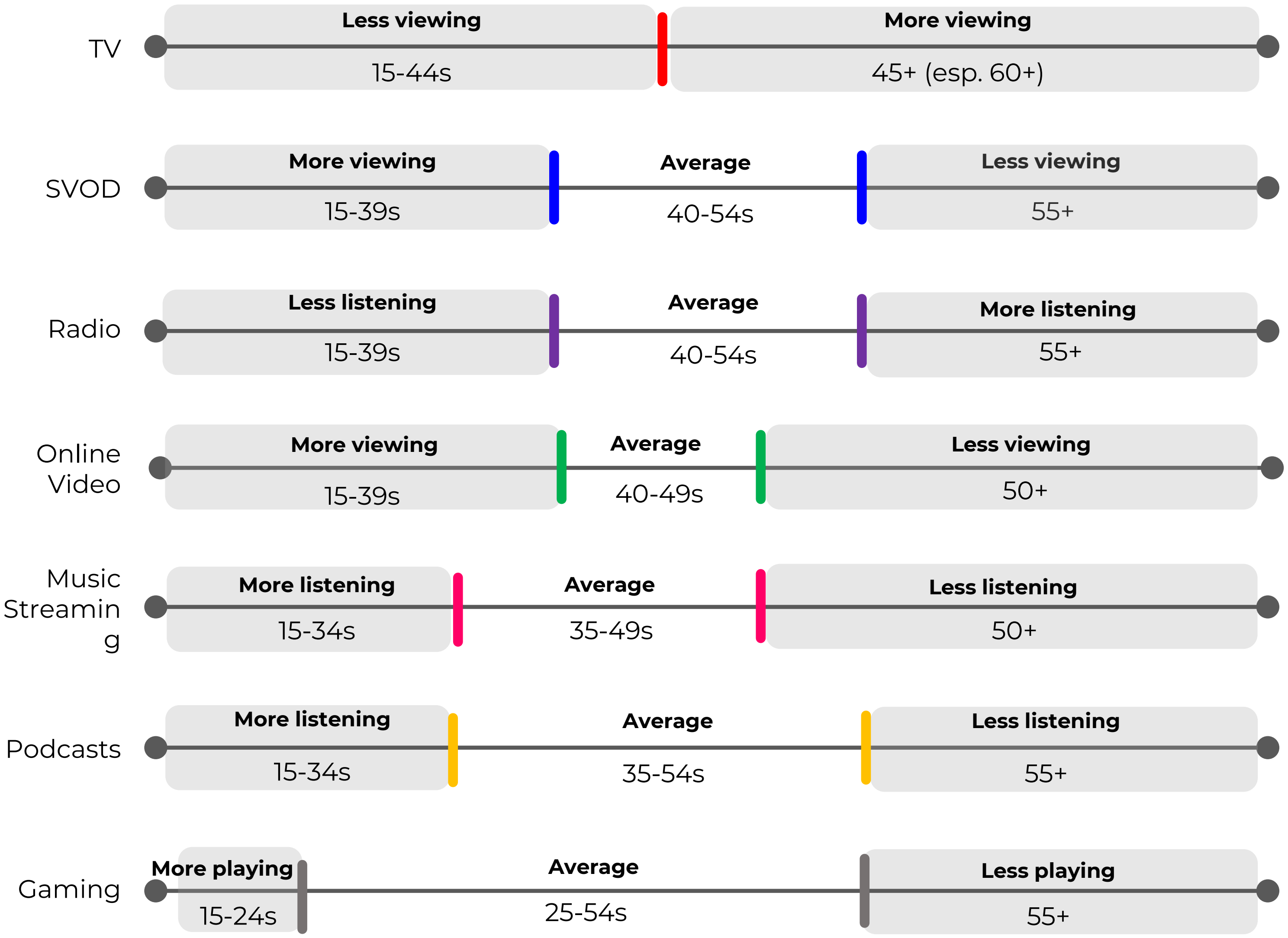
The primary differentiator of media behaviour continues to be age, but as digital media grows and those audiences become broader, the contrasts in behaviour between different audiences are diminishing.

- As the audiences using digital media grow, the profile of those audiences are becoming broader and less weighted towards specific subgroups in the population. Conversely as traditional media declines, these audiences are becoming more narrowly defined.
- The net effect of these two trends is that there are fewer and weaker differentiating factors driving different audience behaviour in 2023 than in the past.
- **The primary differentiator continues to be age and consequently lifestage.**
- Overall the generation gap between older and younger audiences is diminishing as older audiences adopt digital media in greater numbers and, for the first time, show significant decreases in their use of both TV and radio.
- The distinct divide between older and younger generations no longer exists and is now more of a continuum, and the middle generation of 40-59 year olds is now at the cross-over point where digital media audiences are over-taking traditional media.

The three generations of media

- Comparing daily reach by age

There are now three generations of media consumers though the lines between the generations are becoming less strongly defined. The ages of the three generations vary by media, but the middle generation is typically defined as being aged between 40 and 54.



The exception to this pattern continues to be on demand viewing.

The overall audience profile is broader than other media, and the age group that demonstrates the most viewing of on demand are 45-59 year olds.

15 to 29s are less likely to view on demand while 60+ year olds demonstrate an average incidence of viewing.

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Summary of other topics

Sources of news and information

- Since 2021 Stuff (48% use) has become a slightly more widely used source of news and information than TVNZ (45% use).
- However TVNZ (21%) remains the most trusted source by a significant margin (Stuff 13%).
- Social media of all types has become a more widely used source of news and information since 2021, but few New Zealanders see this as their most trusted source.

Captioning and audio description

- Use of captioning while watching TV continues to increase despite TV audiences declining over time.
- More than four in ten (44%) now use captioning.
- Nearly one in ten (9%) use audio description.

Streaming, downloading & torrenting

- While incidence of ever using unauthorised platforms at least once continues to slowly increase, the proportion of New Zealanders who regularly use these is not growing – including among younger audiences.

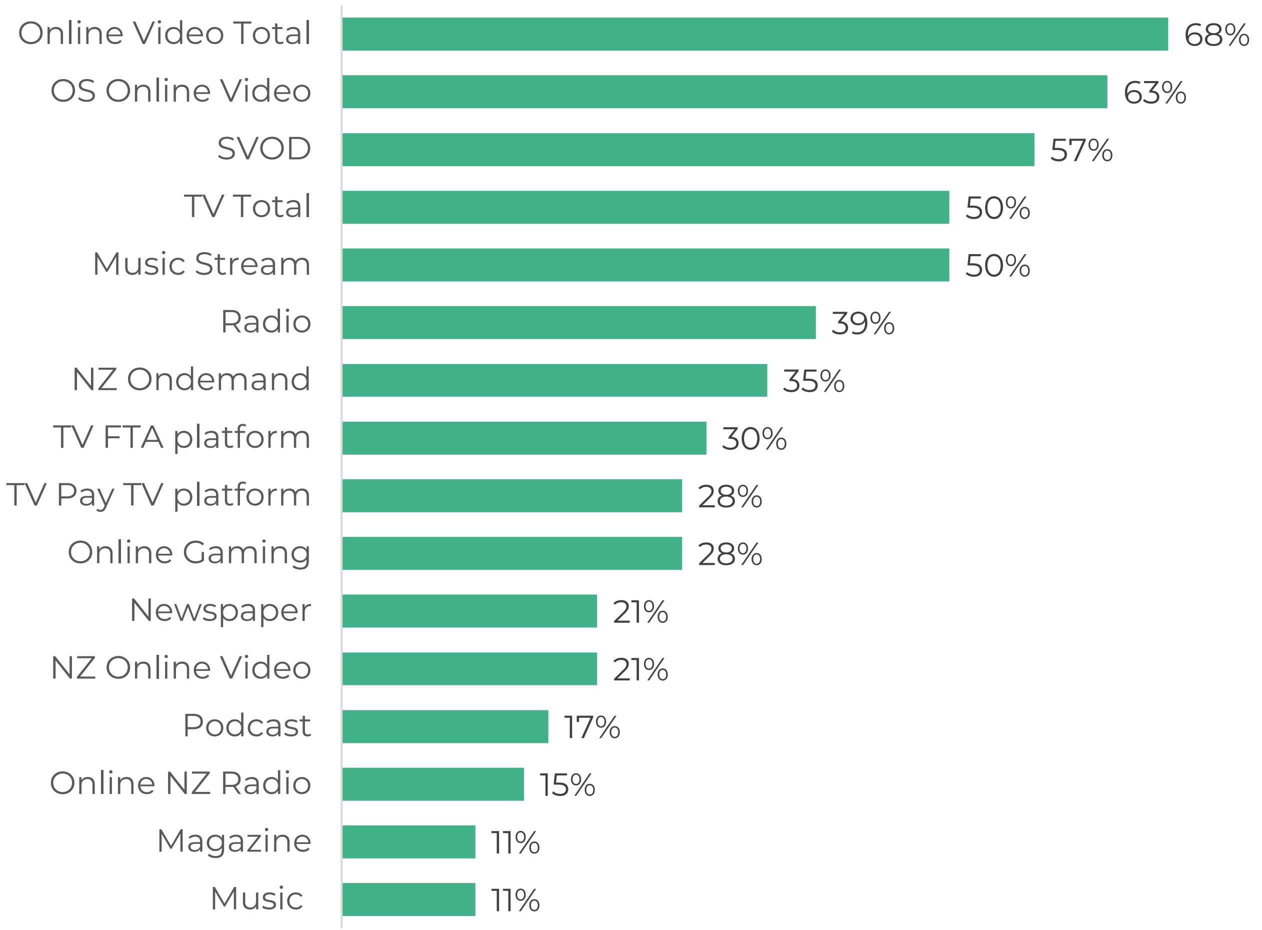
02

DAILY MEDIA BEHAVIOUR

Daily reach 2023

Online video attracts the biggest audience each day, reaching nearly seven in ten New Zealanders. This is driven by overseas online video sites. SVOD attracts nearly six in ten each day, while TV and music streaming reach one in two. Broadcast radio and on demand reach just under four in ten New Zealanders each day.

- All New Zealanders 15+
- % Daily Reach



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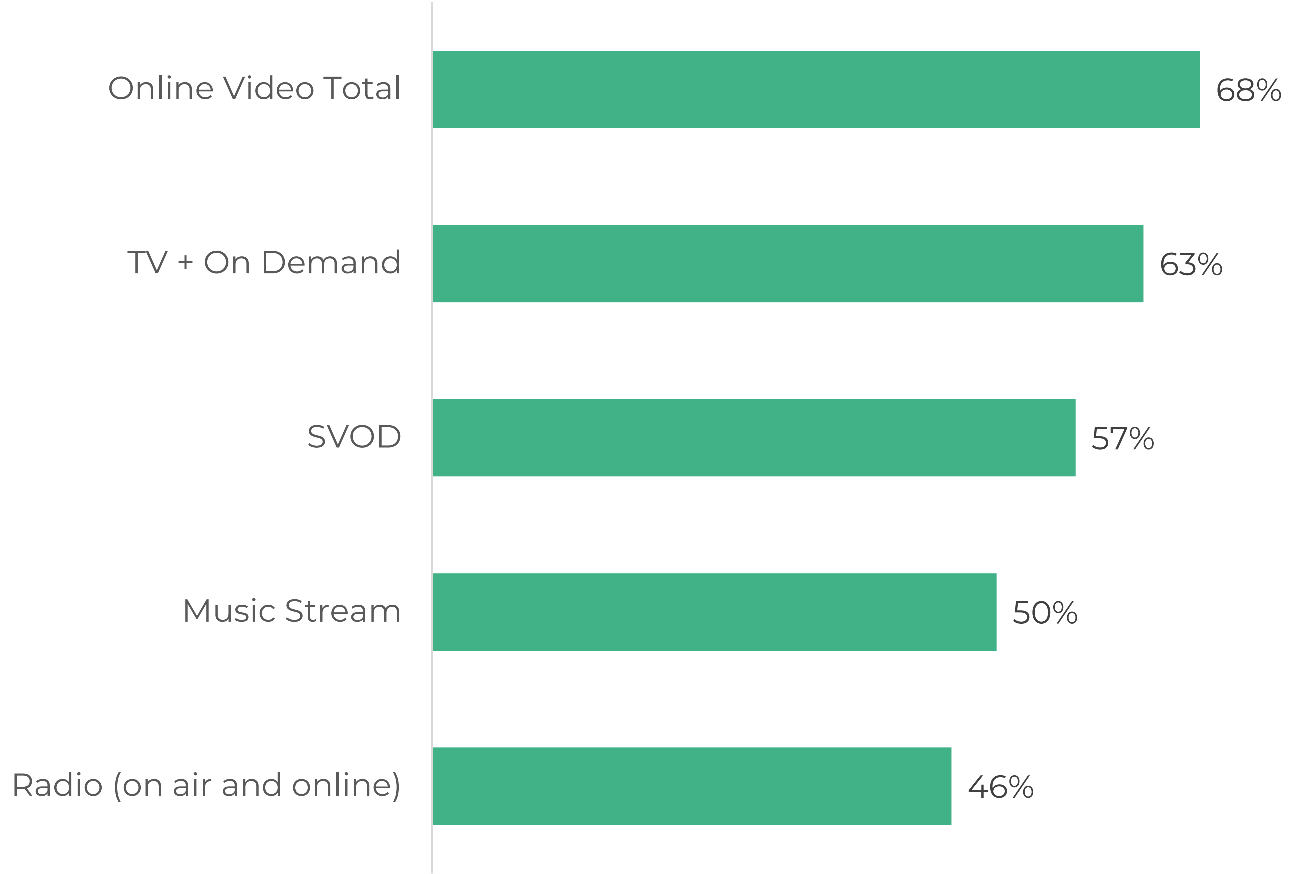
Net daily media audiences 2023

The daily reach of combined media platforms shows online video still attracts the biggest audience, but the combined net daily audience watching TV and/or on demand is only slightly smaller.

- All New Zealanders 15+
- % Daily Reach



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Note: TV + On Demand includes live and time shifted viewing on both platforms.

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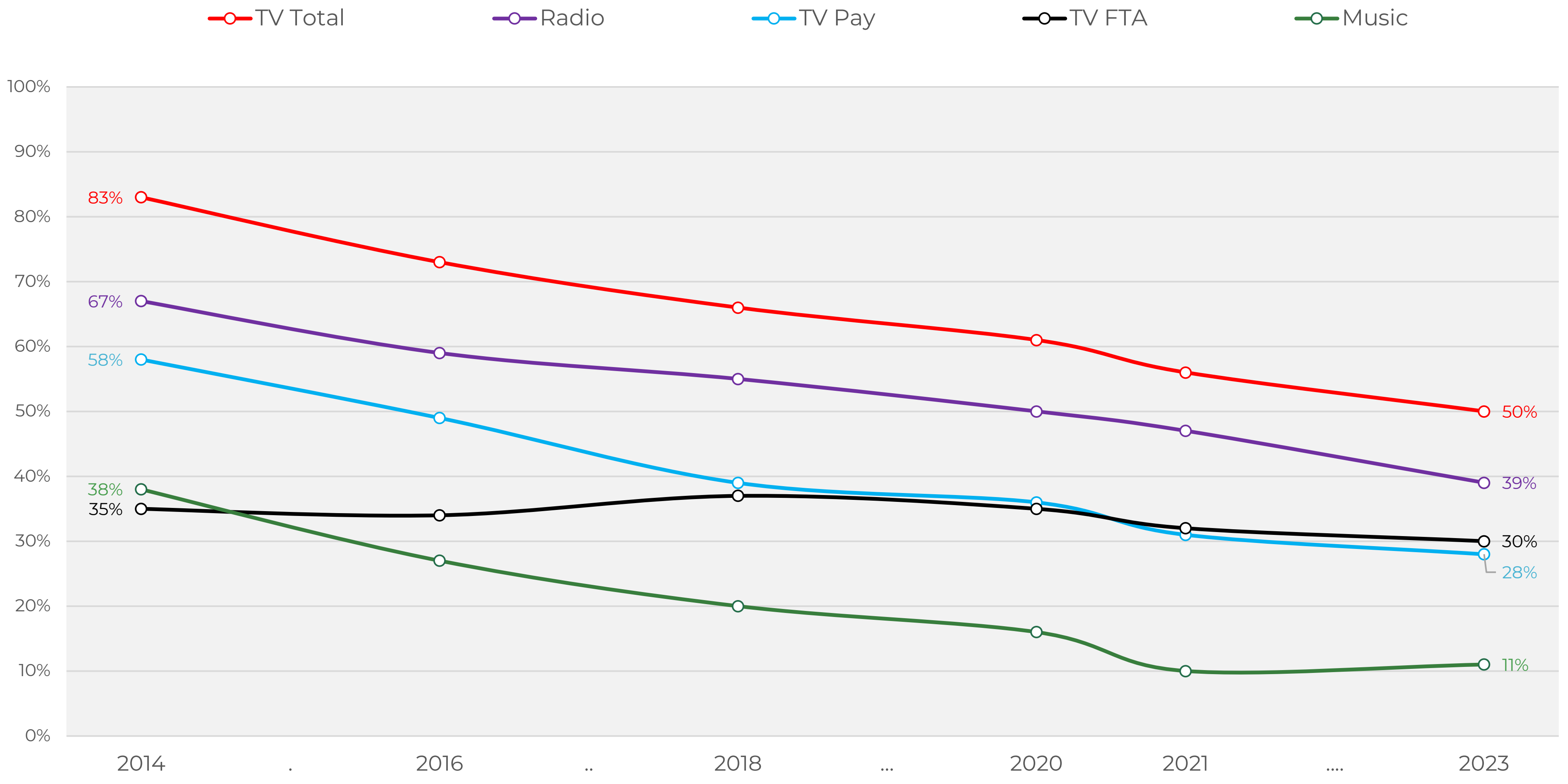
Daily reach over time

Audiences engaging with traditional media continue to decline at the same rate as previous studies. The exception is listening to music on physical formats which is stable since 2021. While watching TV on a free to air platform has declined slightly in 2023 the overall trend is one of stability. The bigger driver of the decline in TV overall is that fewer New Zealanders are watching via a pay TV platform.

- **Traditional media only**
- All New Zealanders 15+
- % Daily Reach



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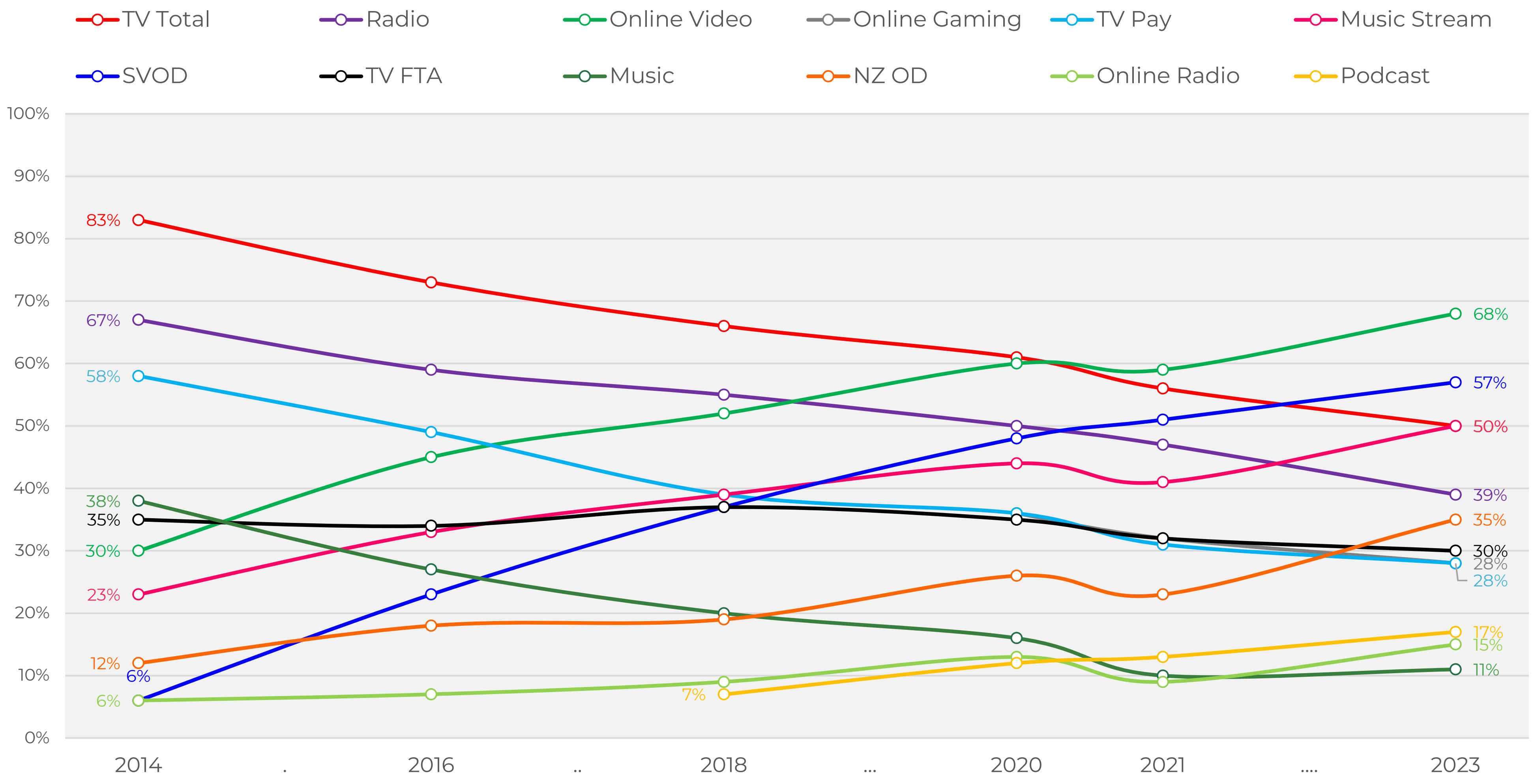
Daily reach over time

Conversely all digital media show significant audience growth since 2021 with on demand audiences growing at the fastest rate. This growth in digital media follows a stable period in 2021, possibly driven by lockdown behaviour.

- **All media**
- All New Zealanders 15+
- % Daily Reach



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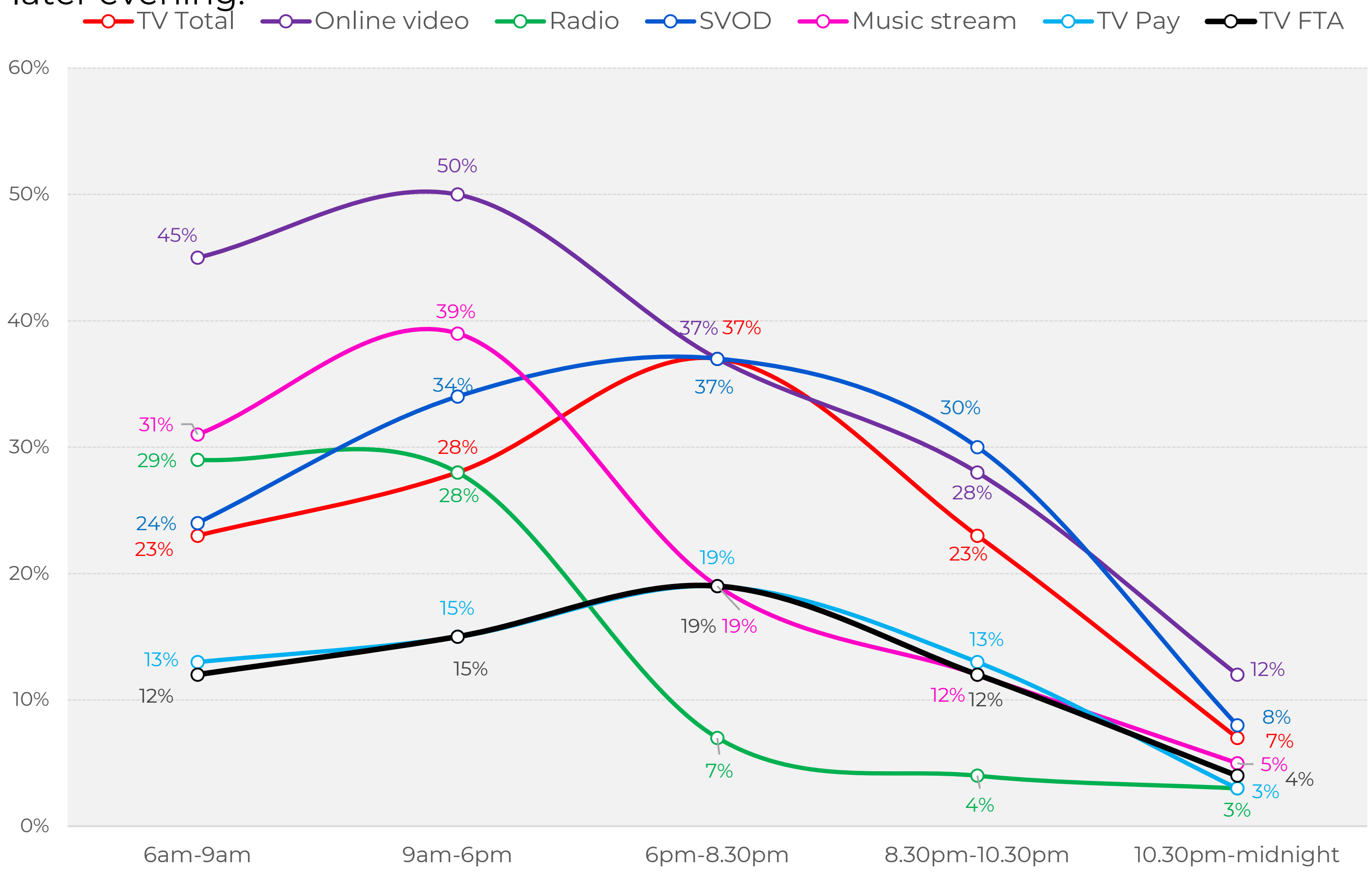
Daily reach across the day – part one

- All New Zealanders 15+
- Reach %

The way New Zealanders engage with media changes over the day. However online video now attracts the biggest or equal biggest audience all day. Music streaming reaches the second biggest audience before 6pm but falls sharply in the evening. Radio reaches the third most New Zealanders in the morning but declines after that. SVOD and TV audiences increase during the day and compete equally with online video between 6-8.30pm. SVOD narrowly reaches the biggest audience in the later evening.



There are some key changes in daily audience behaviour compared to 2021:

- Online video has significantly grown its audience and is more dominant during the day.
- TV no longer reaches the biggest audience in its traditional peak time of 6-10.30pm
- Radio has slipped behind streamed music in the morning. In 2021 36% of New Zealanders listened to the radio before 9am (down to 29%).

Base: All respondents: (2023 n=1,408).

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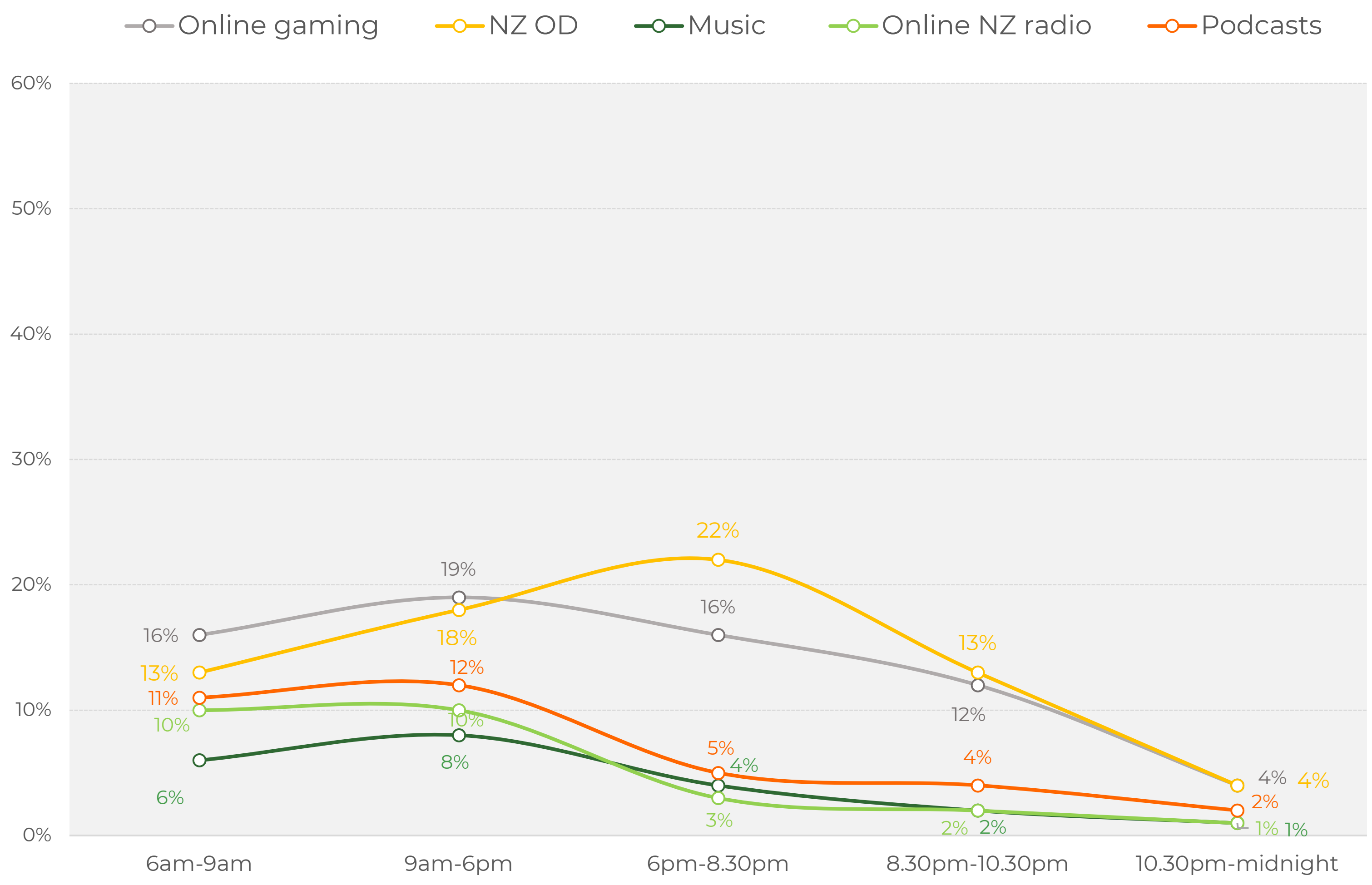
Daily reach across the day – part two

- All New Zealanders 15+
- Daily reach %

Online gaming is relatively steady throughout the day until 8.30pm when it declines slowly. Like SVOD and TV, the on demand audience grows through the day and peaks between 6-8.30pm. Podcasts, online radio and music on physical formats are all most popular before 6pm.



The biggest changes in daily consumption of these media since 2021 are the significant growth in on demand viewing between 9am and 10.30pm, and the development of a peak in on demand viewing during the evening.

Between 6-8.30pm on demand now reaches the fourth biggest audience among New Zealanders overall.

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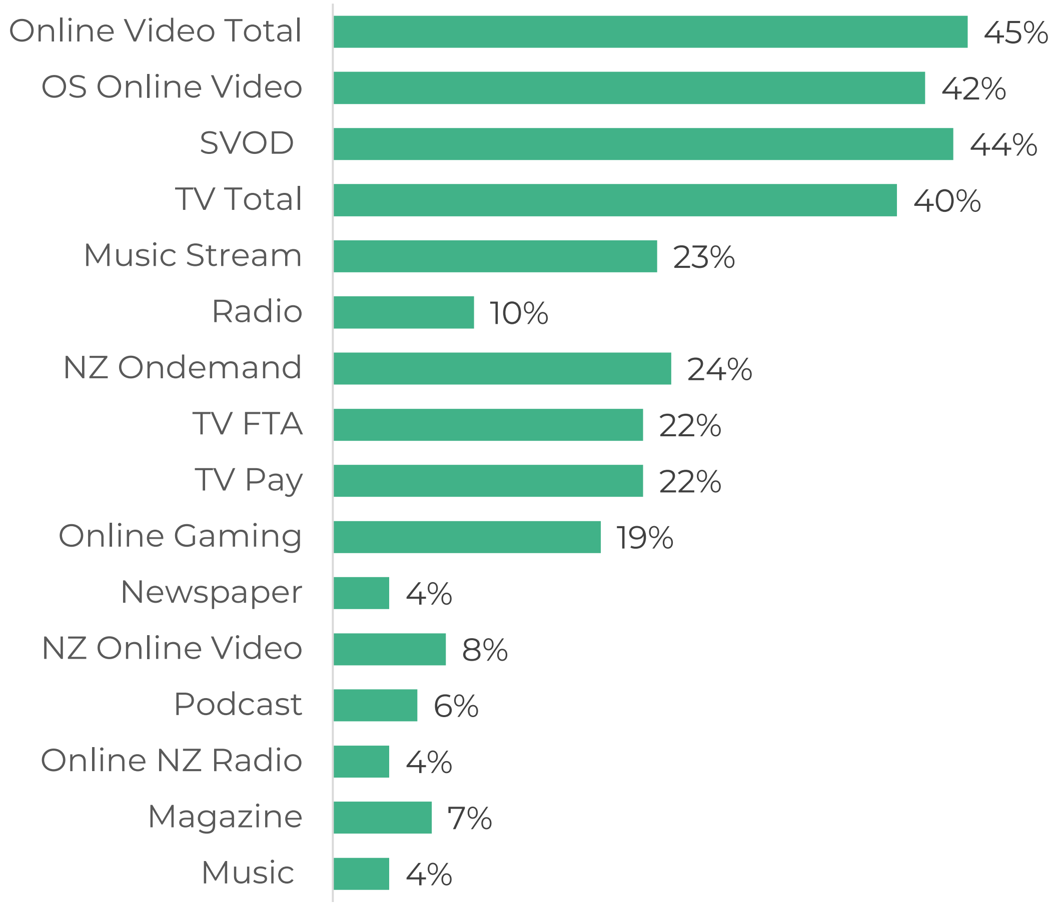
Peak time reach 2023 (6-10.30pm)

- All New Zealanders 15+
- Daily reach %
- Ranked in order of overall daily reach

Base: All respondents (2023 n=1,408).

In 2023 online video, SVOD and TV attract similar sized audiences during the traditional TV peak time of 6-10.30pm, reaching about one in four New Zealanders during this time. Below this, music streaming, on demand and online gaming each reach about one in four or five New Zealanders during this period.



- The key change in audience behaviour since 2021 is that TV no longer attracts the biggest audience during this period:
  - TV reach is down from 48% in 2021
  - Online video up from 41%
  - SVOD up from 39%
- In addition, on demand audiences have significantly grown during this time period - up from 15% in 2021.

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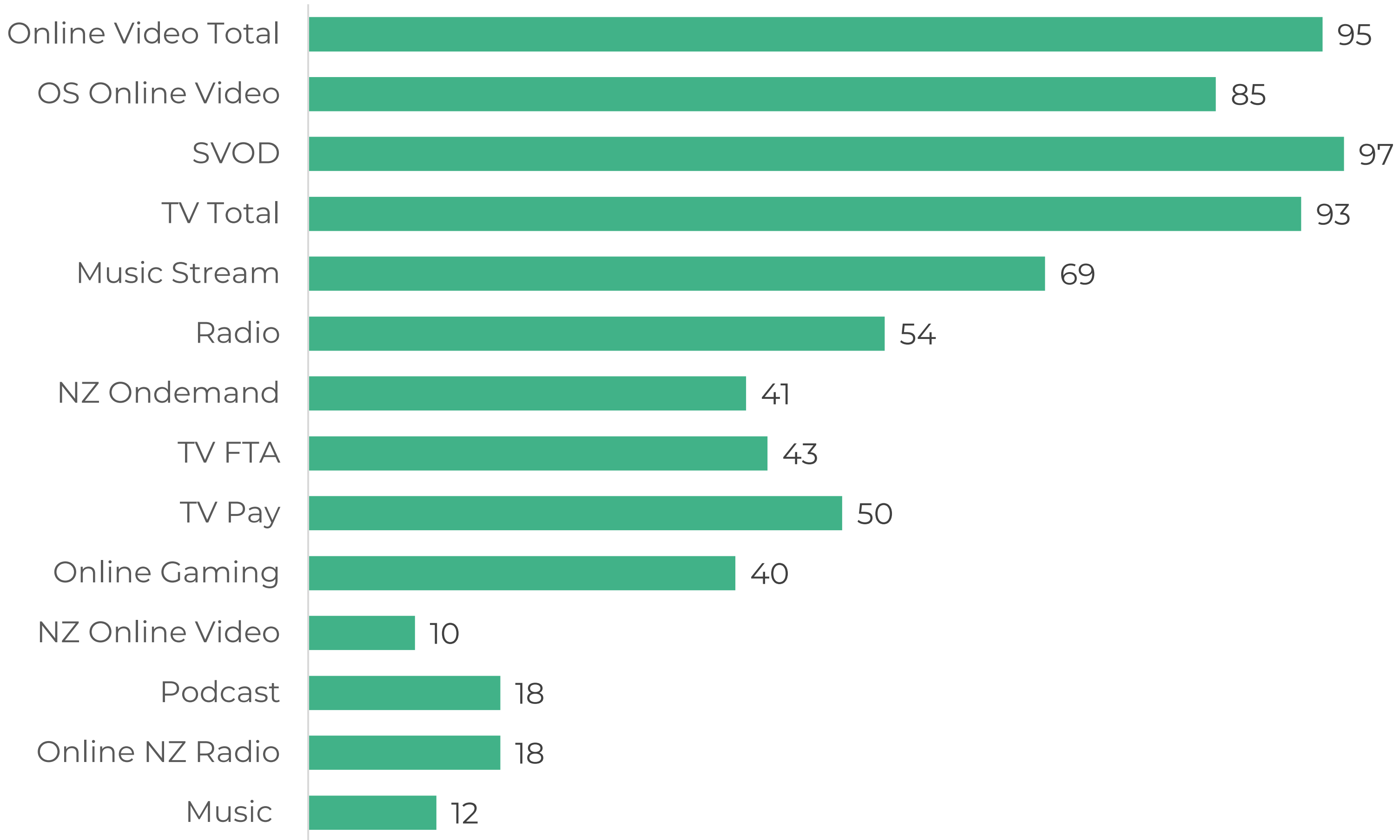
Time spent consuming media 2023

In 2023 New Zealanders spend the same amount of time (just over 90 minutes) watching online video, SVOD and TV each day. New Zealanders listen to streamed music for just over an hour and slightly less than an hour listening to the radio each day. On demand and online gaming are consumed for about 40 minutes each.

Compared to previous studies there is now a closer match in the ranking of reach and time spent using media.

- All New Zealanders 15+
- Average minutes per day
- Ranked in order of overall daily reach 2023



Base: All respondents (2023 n=1,408).

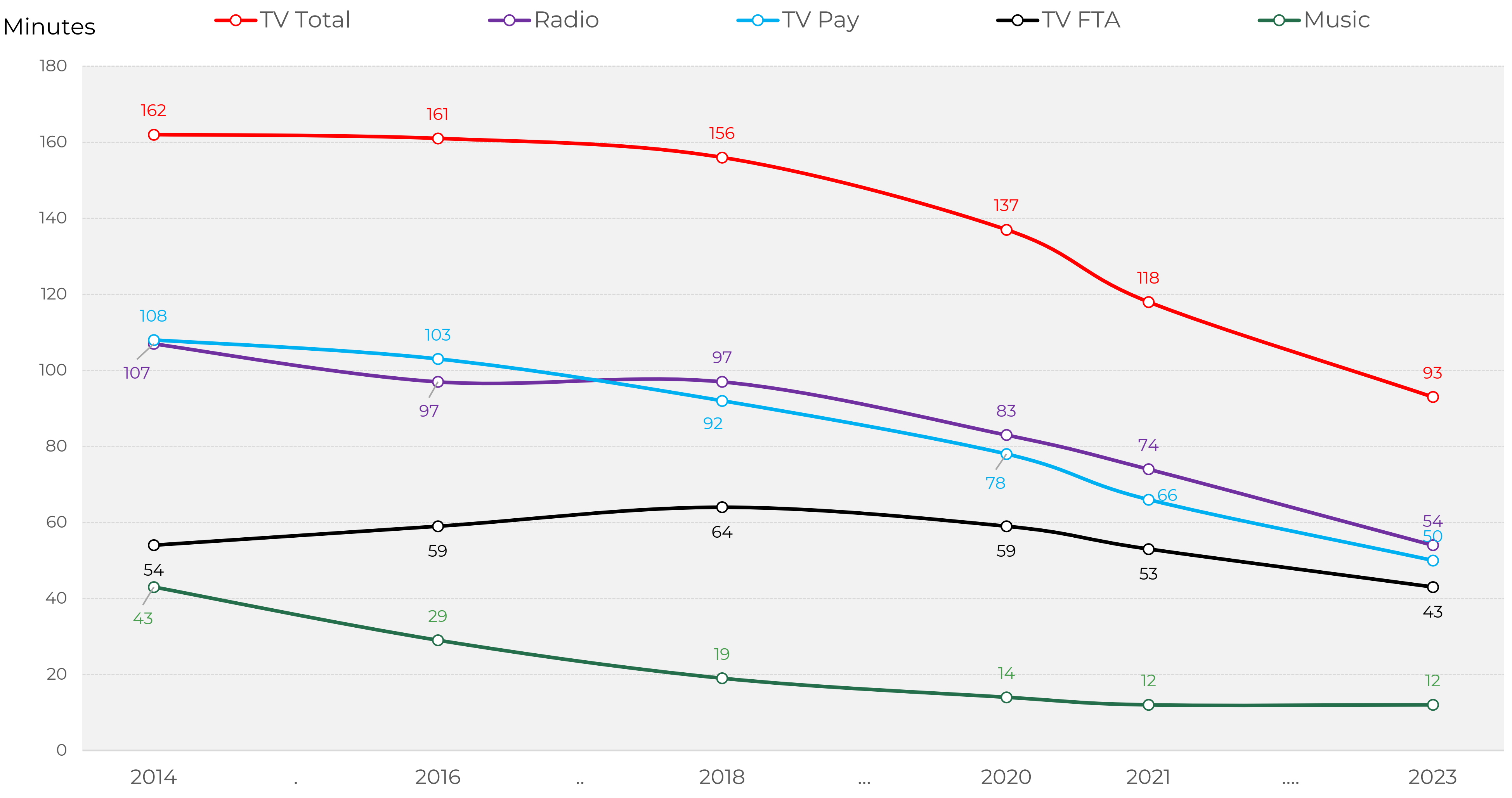
Note: Average minutes are based on all New Zealanders and therefore includes those who did not use each media (ie. includes zero minutes)

Q: Between (TIME PERIOD) about how long did you do (ACTIVITY) for?

Time spent consuming traditional media over time

- **Traditional media only**
- All New Zealanders 15+
- Average minutes per day

With the exception of music on physical formats, the amount of time New Zealanders dedicate to traditional media continues to decline and at a similar rate over time. There is currently no sign this trend is stabilising.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Average minutes are based on all New Zealanders and therefore includes those who did not use each media (ie. includes zero minutes)

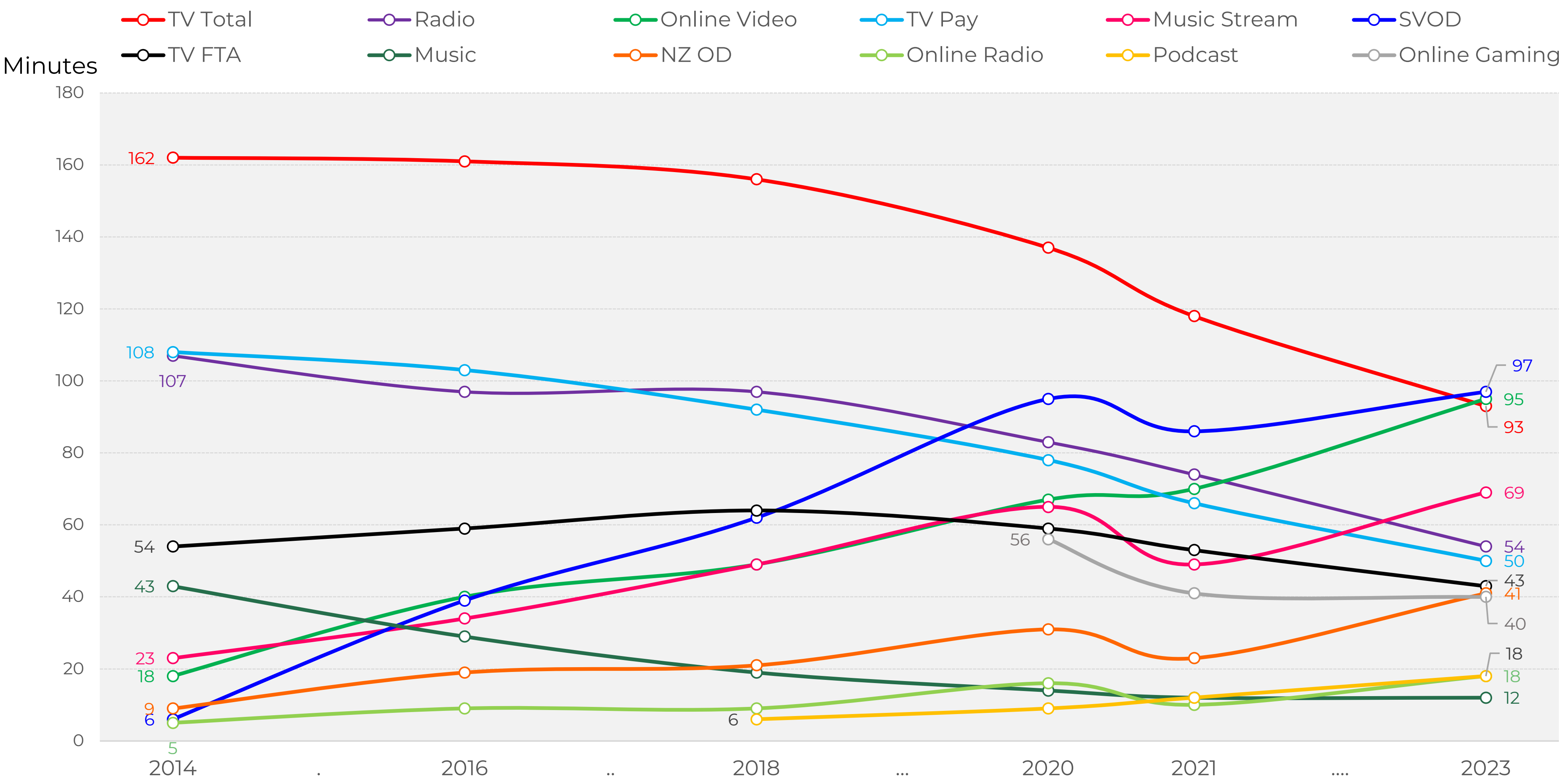
Irirangi Te Motu NZ On Air Glasshouse

Q: Between (TIME PERIOD) about how long did you do (activity) for?

Time spent consuming all media over time

- **All media**
- All New Zealanders 15+
- Average minutes per day

Conversely, after a drop in growth in 2021, time spent with nearly all digital media shows significant growth in 2023 – especially SVOD, music streaming and on demand. The time New Zealanders dedicate to online video and SVOD has overtaken TV for the first time, and music streaming has overtaken radio.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Average minutes are based on all New Zealanders and therefore includes those who did not use each media (ie. includes zero minutes)

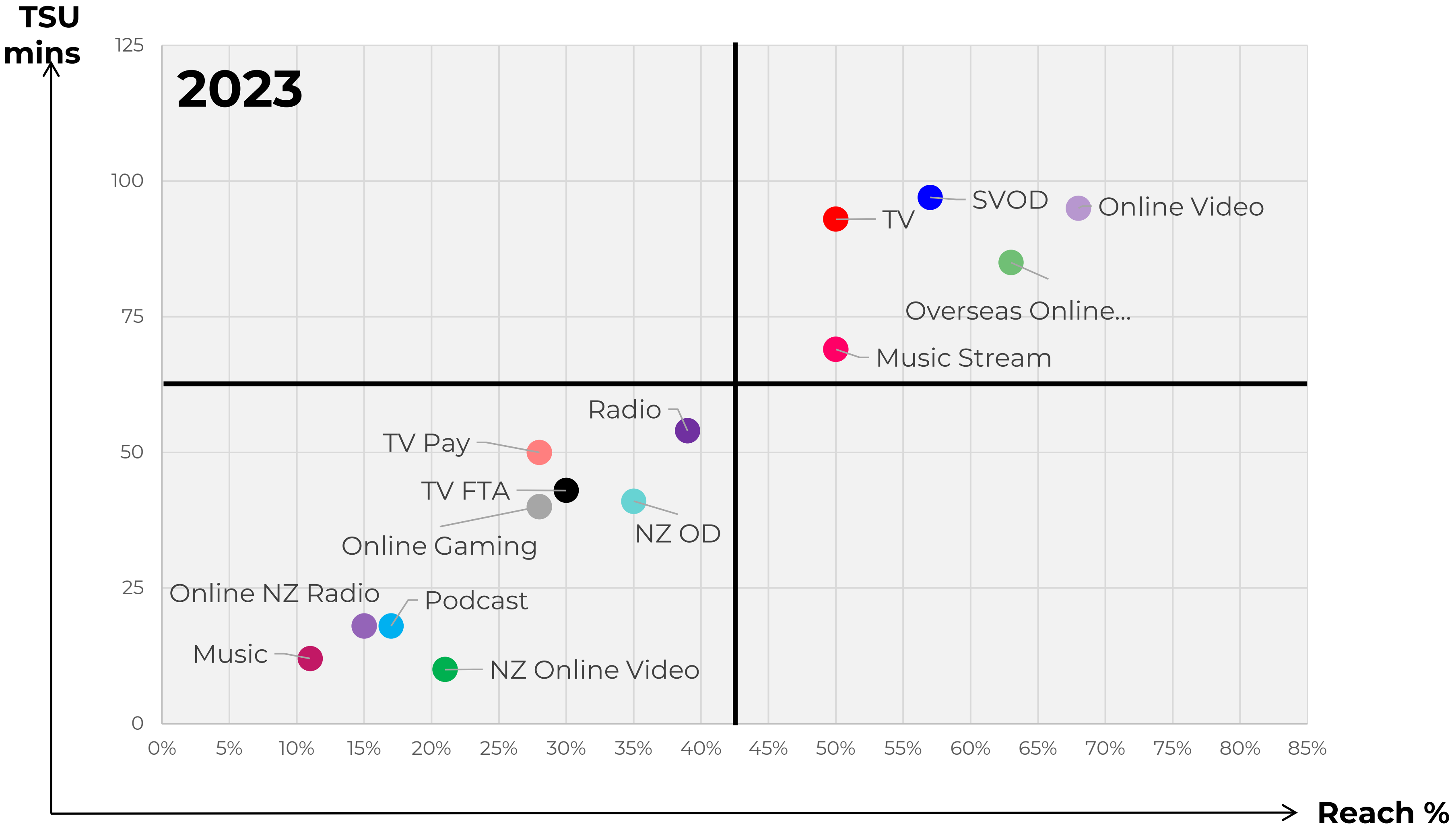
Irirangi Te Motu NZ On Air   Glasshouse

Q: Between (TIME PERIOD) about how long did you do (activity) for?

Daily reach & time spent using media 2023

- All New Zealanders 15+

There is now a stronger linear relationship between reach and time spent using media – i.e. the media that attract the biggest audiences now also tend to attract the most time spent. The biggest changes have been the decline in time spent watching TV and listening to the radio. In addition, since 2021 on demand has increased significantly in terms of both reach and time spent watching.



Base:
All respondents (2023 n=1,408).

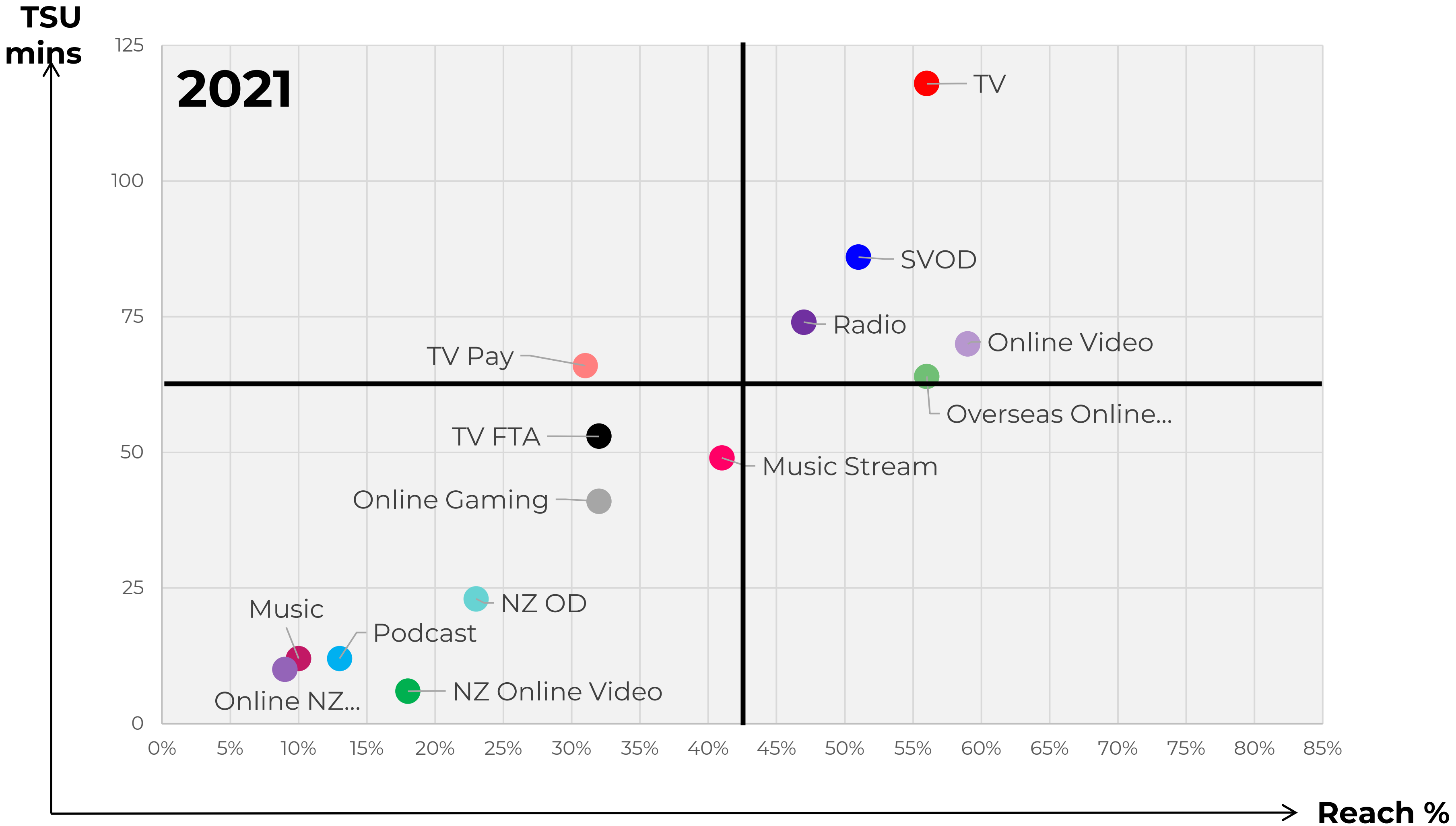
Average minutes are based on all New Zealanders and therefore includes those who did not use each media (ie. includes zero minutes)

Daily reach & time spent using media 2021

- All New Zealanders 15+

For reference we have included the same chart from 2021 to demonstrate changes over time.

In 2021 TV continued to generate greater engagement than other media, even if its reach had declined below online video. On demand was also in the lower tier in terms of both reach and time spent.



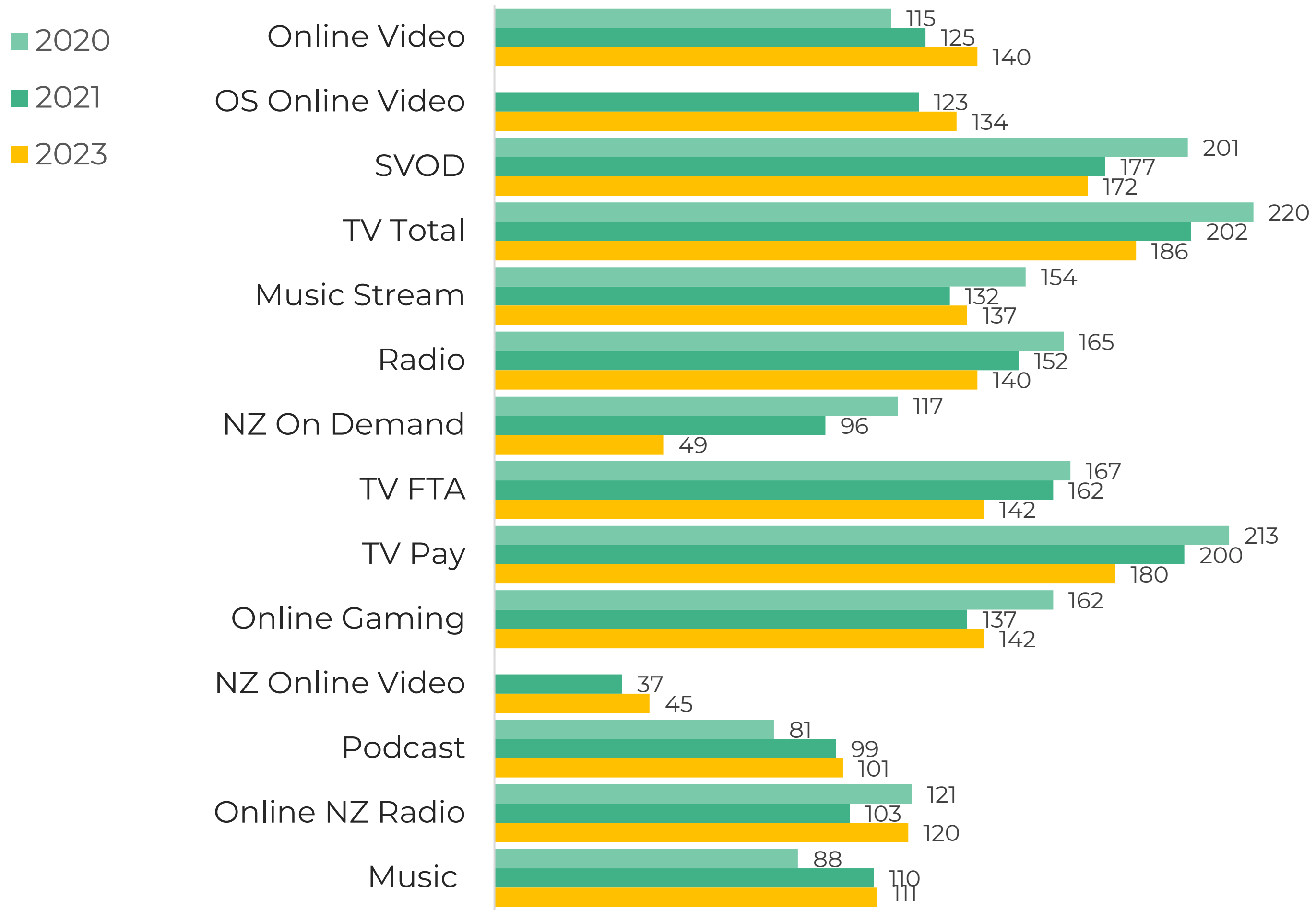
Base:
All respondents (2021 n=1,420).

Average minutes are based on all New Zealanders and therefore includes those who did not use each media (ie. includes zero minutes)

Engagement with media 2020-2023

- Among all users of each media
- Average minutes per day
- Ranked in order of overall daily reach 2023

This is a measure of engagement among users of each media. On this measure, TV viewing continues to drive the highest level of engagement with viewers dedicating more than three hours to TV each day. SVOD generates the second highest level of engagement among viewers at slightly less than three hours. Users engage with online video, streamed music, radio and online gaming for slightly less than 2.5 hours each.



On demand viewing among users is actually declining, despite its significant growth in both reach and overall time spent.

This trend is explained by new users of on demand being lighter users than in the past.

Base: All respondents (2023 n=1,408).

Note: Average minutes are based on all users of each media and therefore excludes those who did not use each media (ie. excludes zero minutes)

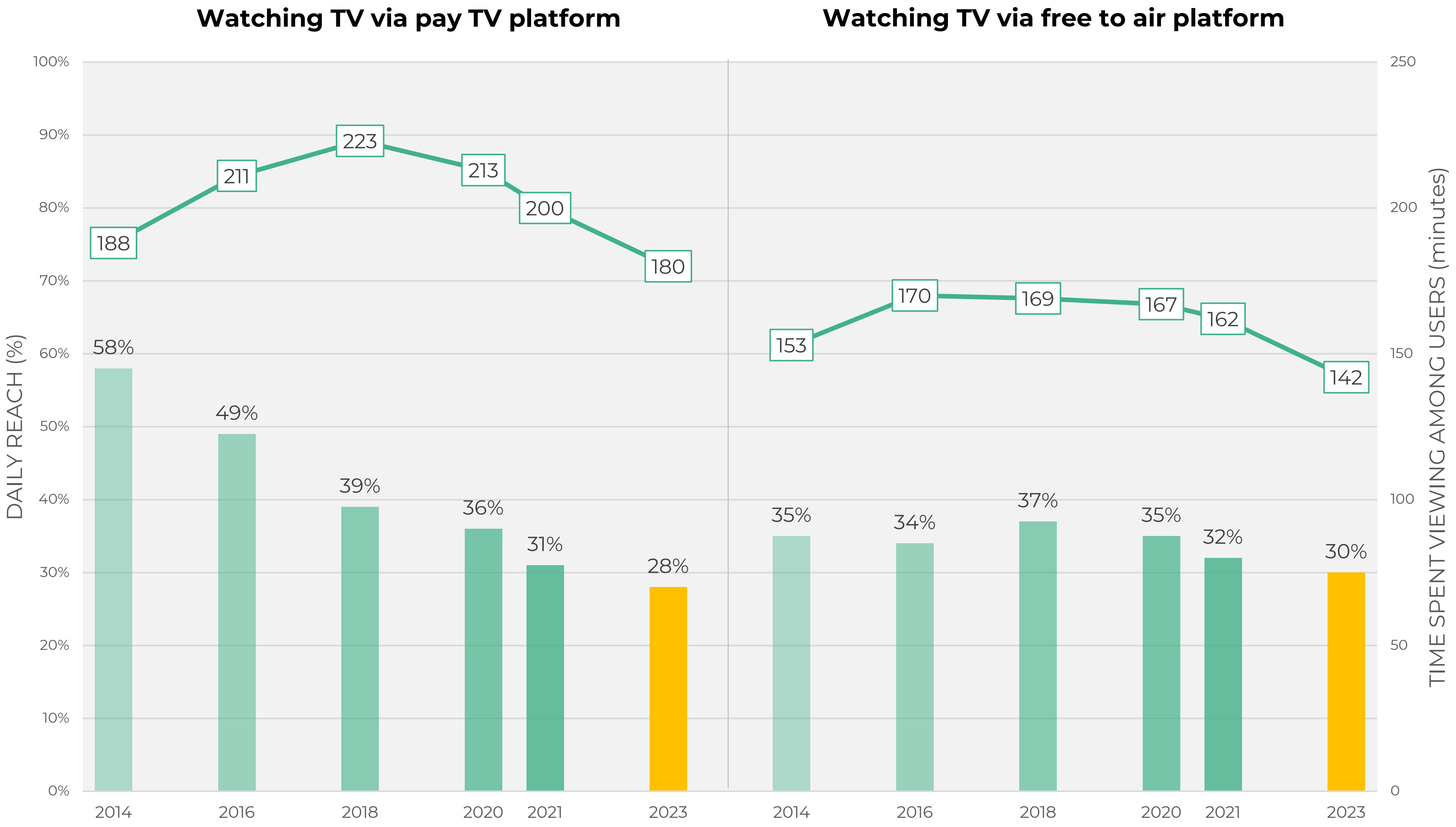
Q: Between (TIME PERIOD) about how long did you do (activity) for?

Total daily reach (all New Zealanders) & time spent (among users) over time - TV

- All New Zealanders 15+ (reach)
- All users of each media (time spent)

Base: REACH | All respondents (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420); 2023 n=1,408). TIME SPENT VIEWING | All users of each media

TV audiences have been declining over time due to both losing viewers (ie. reach) as well as declining engagement, particularly among viewers on a pay TV platform. TV viewing has been more stable on a free to air platform, but for the first time the 2023 results also show a significant decline in engagement among viewers on a free to air platform.



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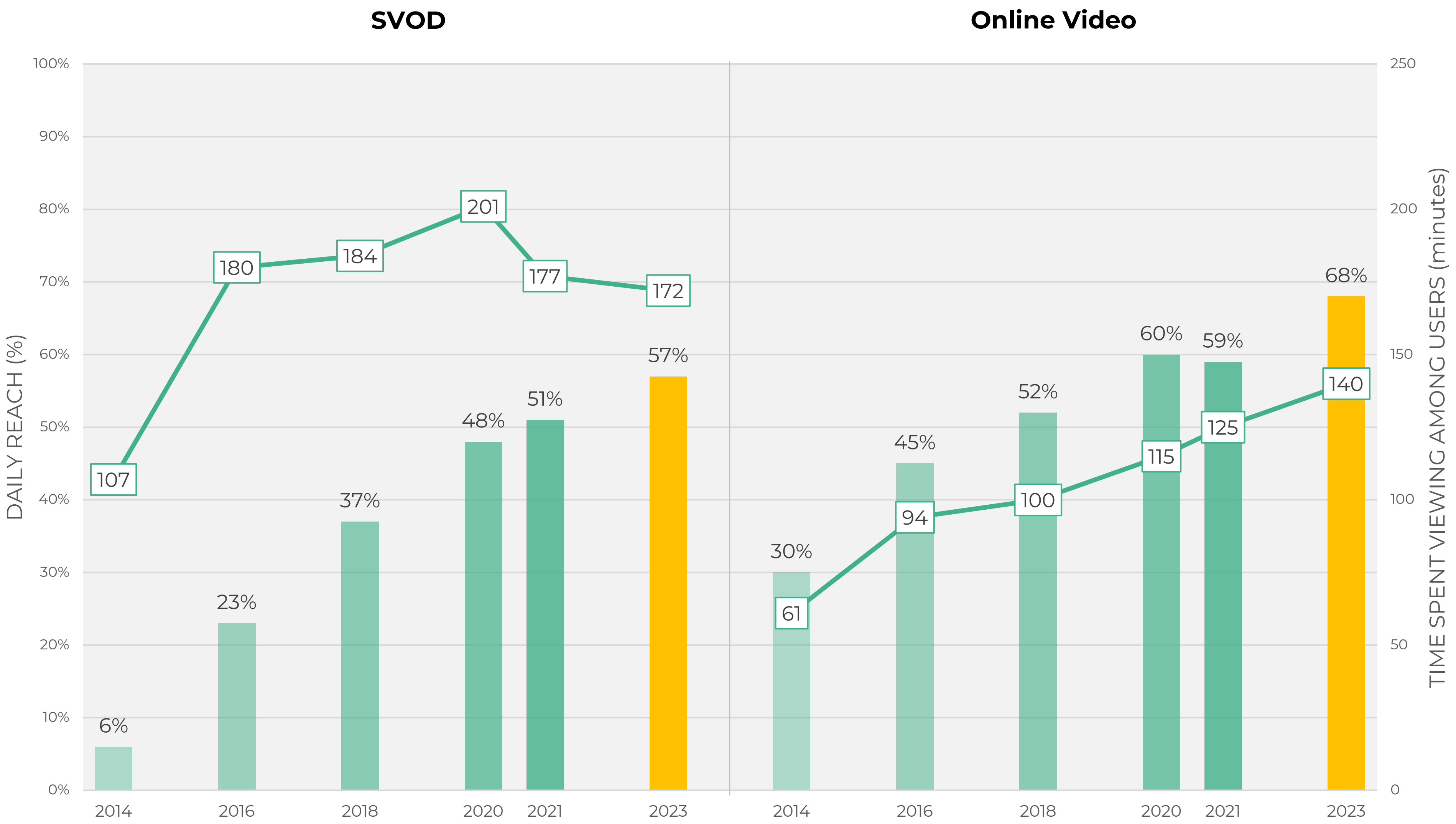
Glasshouse

Total daily reach (all New Zealanders) & time spent (among users) over time – video media

- All New Zealanders 15+ (reach)
- All users of each media (time spent)

SVOD continues to grow its audience size but levels of engagement are stable or even declining as lighter viewers become SVOD viewers. On the other hand, the size of the audience watching online video not only continues to grow, but levels of engagement also continue to increase.



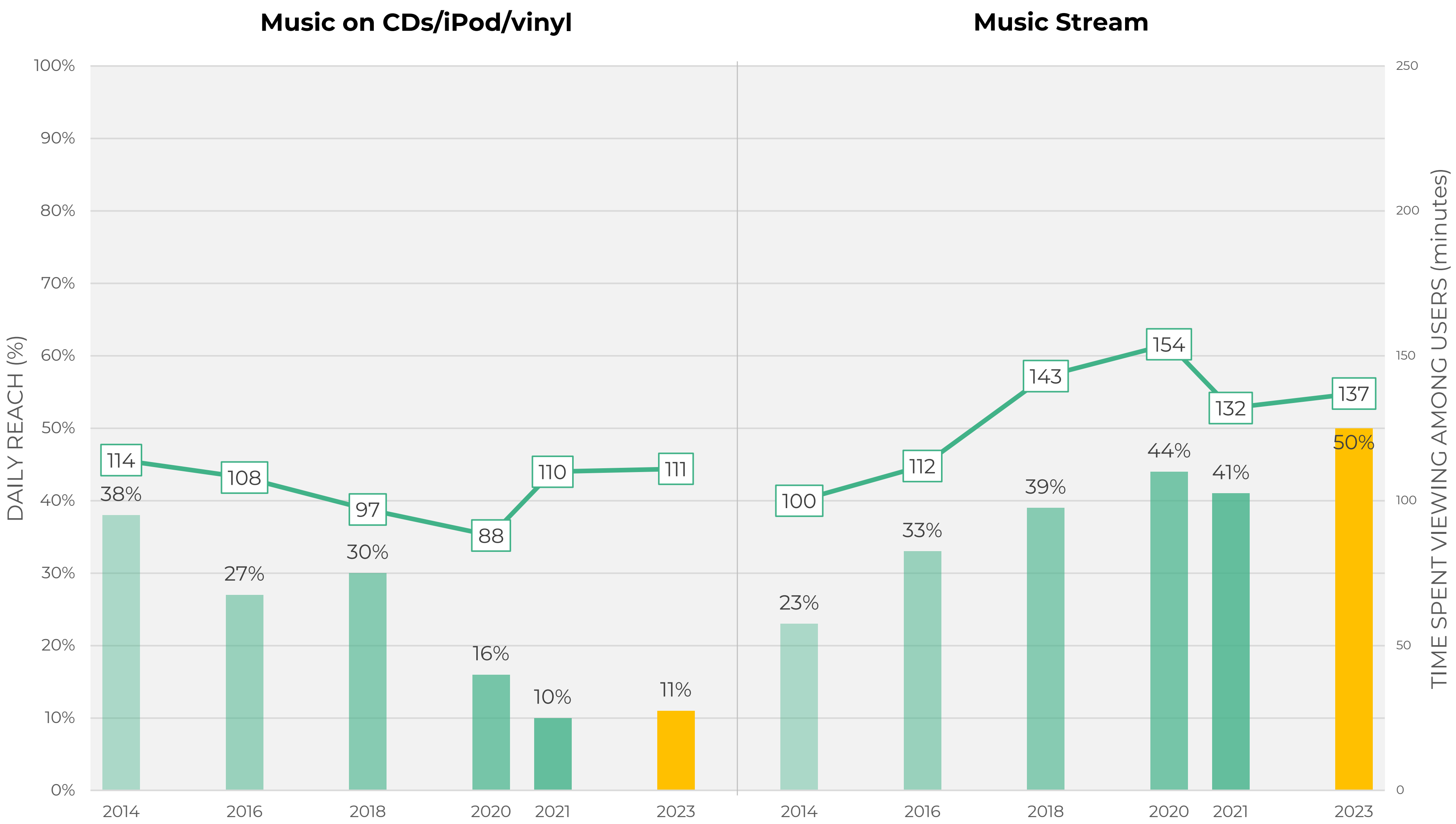
Base: REACH | All respondents (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420); 2023 n=1,408). TIME SPENT VIEWING | All users of each media

Irirangi Te Motu NZ On Air Glasshouse

Total daily reach (all New Zealanders) & time spent (among users) over time – music

- All New Zealanders 15+ (reach)
- All users of each media (time spent)

There are indications that the decline in audiences listening to music on physical formats has levelled off leaving relatively heavy listeners still engaging with this media. Streamed music however continues to grow significantly in terms of audience size, and more slowly in terms of engagement after declining in 2021.



Base: REACH | All respondents (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420); 2023 n=1,408). TIME SPENT VIEWING | All users of each media

Media repertoires of daily media 2023

- All New Zealanders 15+
- Based on daily reach

Note: Example of how to read table: Of those who watched TV yesterday, 43% also watched on demand that day.

Media repertoires vary. On demand viewers are more likely to also consume all video media (TV, SVOD, online video) each day. There is a strong overlap in audiences using SVOD, music streaming and online video. Radio listeners are more likely to watch TV that day which suggests there might be a loyal audience using traditional media, however TV audiences are not more likely to also listen to the radio.

Media watched yesterday (row %'s)

	Linear TV	On demand	SVOD	Online Video	Radio	Music Streaming
Linear TV		43%	53%	60%	47%	43%
Ondemand	61%		66%	71%	42%	51%
SVOD	47%	41%		77%	38%	61%
Online Video	44%	37%	65%		37%	62%
Radio	60%	38%	55%	64%		47%
Music Streaming	43%	36%	69%	83%	37%	

Base: All respondents (2023 n=1,408).

Changes in media repertoires 2021 - 2023

- All New Zealanders 15+
- Showing only the significant changes since 2021

Note: Example of how to read table: Of those who watched TV yesterday, 43% also watched on demand that day.

In 2021 this proportion was 26%, indicating that more TV viewers are now also watching on demand.

Base: All respondents (2023 n=1,408).

There are indications of how audiences are shifting between media over time. On demand's growth since 2021 appears to be coming from all other media as opposed to simply cannibalising TV audiences. TV audiences appear to be adopting all digital media in greater numbers, and also moving away from radio. Radio audiences are adopting all digital media including music streaming.

Media watched yesterday (row %'s)

	Linear TV	On demand 2023	On demand 2021	SVOD 2023	SVOD 2021	Online Video 2023	Online Video 2021	Radio 2023	Radio 2021	Music Streaming 2023	Music Streaming 2021
Linear TV		↑ 43%	26%	↑ 53%	42%	↑ 60%	51%	↓ 47%	57%	↑ 43%	31%
Ondemand								↓ 42%	49%		
SVOD		↑ 41%	29%								
Online Video		↑ 37%	27%					↓ 37%	44%		
Radio		↑ 38%	24%	↑ 55%	47%	↑ 64%	56%			↑ 47%	34%
Music Streaming		↑ 36%	27%								

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03

HOW DO DIFFERENT AUDIENCES COMPARE IN 2023

What drives different audience behaviour?

Age continues to be the main differentiating factor influencing audience behaviour. However as digital media grows and these audiences become broader, then the contrasts in behaviour between different audiences are diminishing.

- As the audiences using digital media grow, the profile of those audiences are becoming broader and less weighted towards specific subgroups in the population . Conversely as traditional media declines, these audiences are becoming more narrowly defined.
- The net effect of these two trends is that there are fewer and weaker differentiating factors driving different audience behaviour in 2023 than in the past.
- **The primary differentiator continues to be age and consequently lifestage.**
- The only other consistent secondary variable is ethnicity. Previous factors of socio-economic level, region and gender are influencing behaviour less than in the past.
- Full profiles of daily media consumption and access to devices and platforms by demographic variables are included in the Appendix.
- The following charts summarise the impact of age and lifestage on media behaviour in 2023.

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The generation gap in media consumption

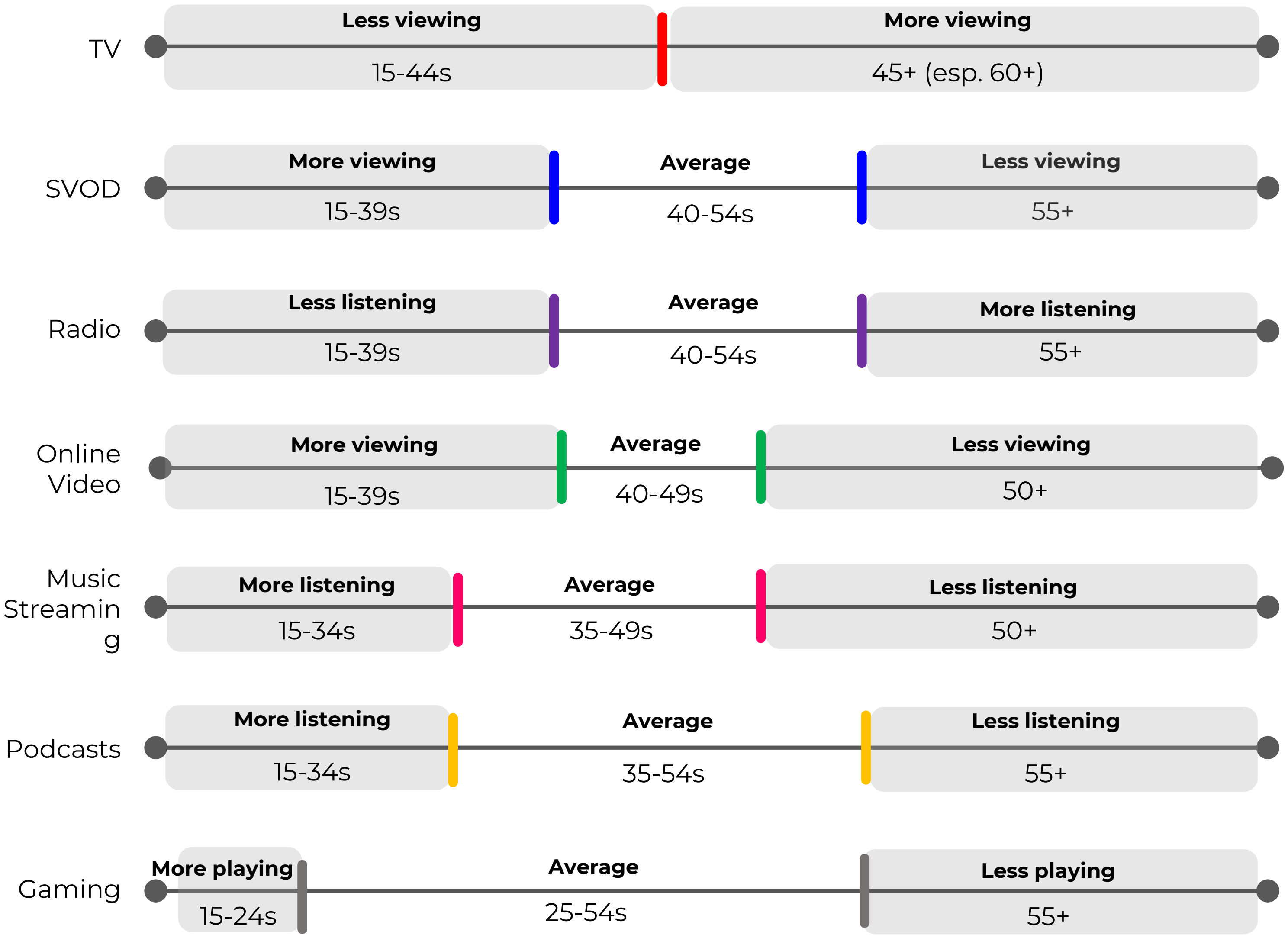
There continues to be a generation gap in media consumption between younger and older New Zealanders. However over time this is becoming less of a distinct divide and more of a continuum. In addition the contrast between the youngest and oldest audiences is slowly diminishing, for some media at least, as digital media grows among all generations.

- In 2021 the stark divide previously seen between generations at about the age of 40-45 was diminishing and becoming more of a continuum. In addition the generation gap had closed a little for digital media as older New Zealanders adopted those media in greater numbers. The 2021 WATA study also noted there were now effectively three generations of media consumers.
- This trend has continued over the last two years. For most media there is a younger generation among whom digital media dominates, a middle aged audience more divided between traditional and digital media, and a much older audience among whom traditional media is still most popular. The age brackets defining these generations are also similar to 2021.
- However it is clear in 2023 that the older generation is now adopting digital media in far greater numbers, and for the first time we are also seeing this older group significantly decreasing their use of traditional media.
- In addition the middle aged group is currently at the cross-over point where digital media is overtaking traditional media.
- Both these trends mean that the generation gap is diminishing.

The three generations of media usage

- Comparing daily reach by age

The ages of the three generations of media consumers vary by media, with the youngest being typically under 40 and the oldest being 50 years old or more.



The exception to this pattern continues to be on demand viewing.

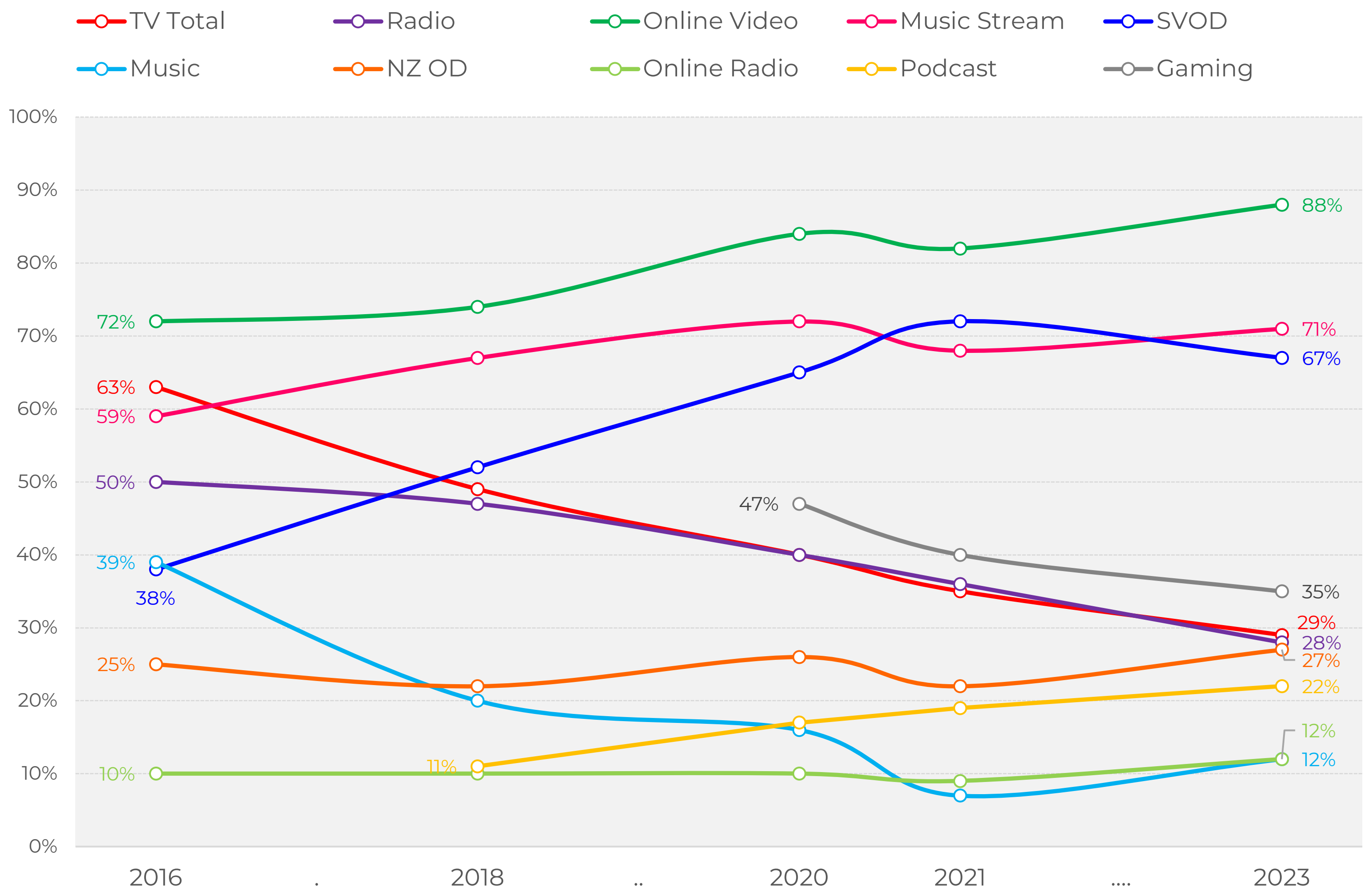
The overall on demand audience profile is broader than other media, and the age group that demonstrates the most viewing of on demand are 45-59 year olds.

15 to 29s are less likely to view on demand, while 60+ year olds demonstrate average incidence of viewing.

Daily reach of media over time - 15-39 year olds

- Daily reach %

Among the younger generation digital media dominates with online video reaching the biggest audience and continuing to grow with nearly nine in ten watching each day. SVOD and music streaming reach the second biggest audiences but growth may have stabilised. On demand and podcasts have also grown their audience since 2021, with on demand almost overtaking TV in 2023.



TV and radio continue to decline among 15-39s, now reaching less than three in ten each day.

Interestingly gaming also continues to show decline among this younger age group.

Base: All respondents: (2016 n=576; 2018 n=577; 2020 n=630; 2021 n=587, 2023 n=580).

Note: TV viewing includes live and time shifted viewing, in and out of home.

Irirangi Te Motu NZ On Air

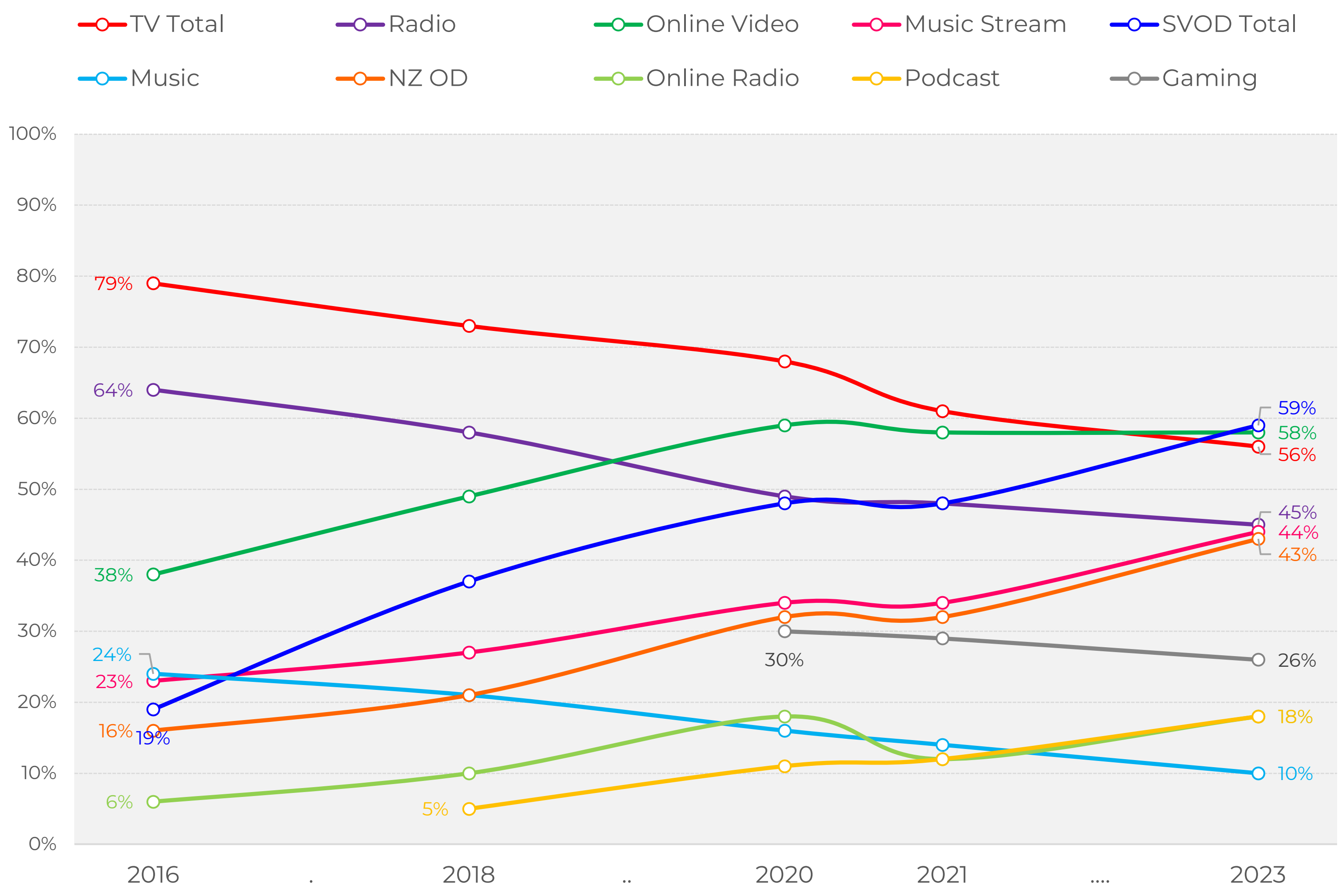
Glasshouse

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of media over time - 40-59 year olds

- Daily reach %

2023 represents the cross-over point when the audience using digital media overtakes traditional media among 40-59 year olds. SVOD now narrowly reaches the biggest audience each day among this age group with TV declining and online video stable. Music streaming and on demand have grown and now attract the same size audience as radio, with podcasts also growing over time.



All traditional media, as well as gaming, continue to decline in popularity among 40-59s, whereas all digital media except online video continue to grow.

Base: All respondents: (2016 n=576; 2018 n=577; 2020 n=630; 2021 n=587, 2023 n=459).

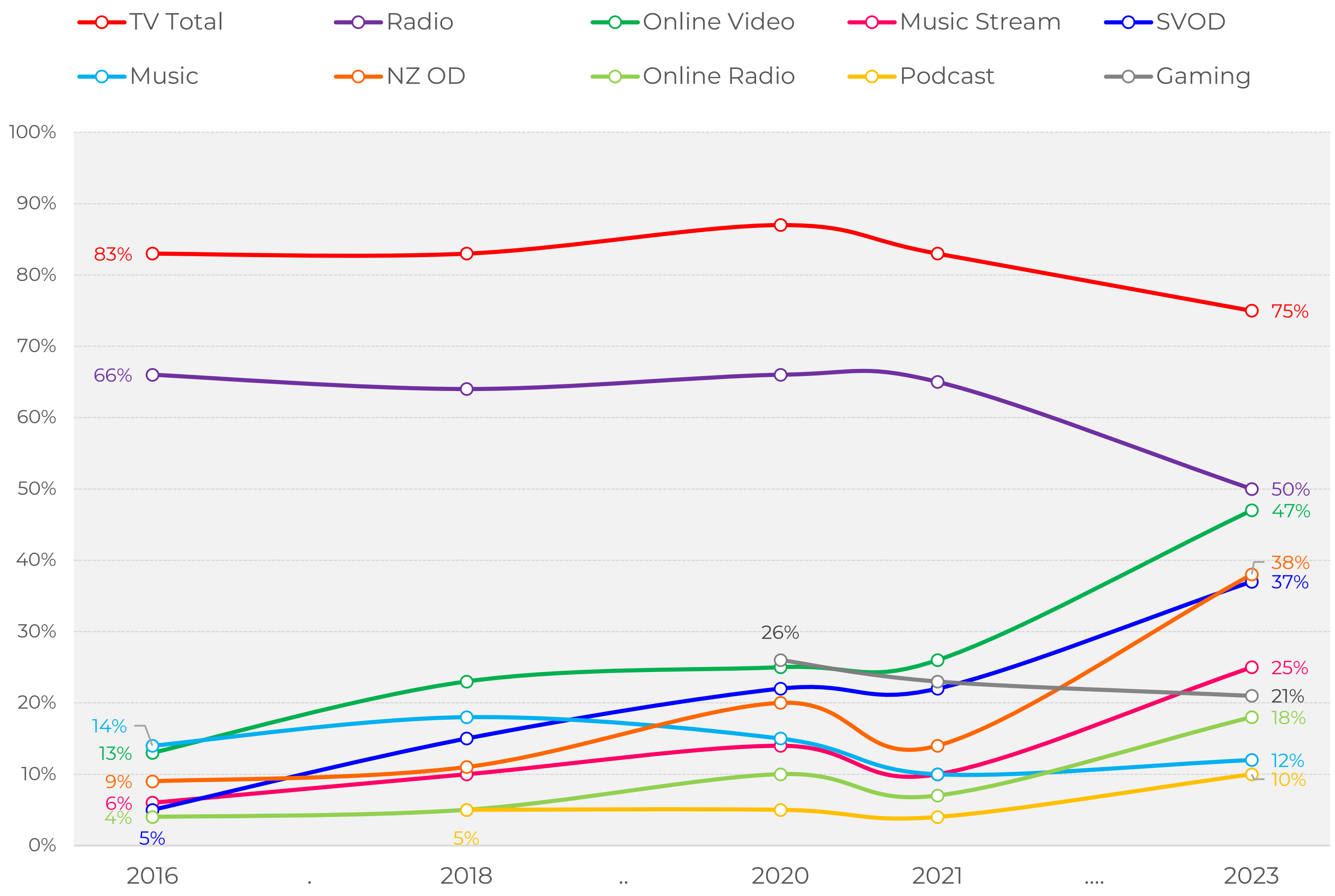
Note: TV viewing includes live and time shifted viewing, in and out of home.

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of media over time - 60+ year olds

- Daily reach %

For the first time both TV and radio are showing significant declines among 60+ year olds. While TV and radio (narrowly) still attract the biggest audiences each day, all digital media show significant growth since 2021. Online video, SVOD and on demand in particular have started to bridge the gap to radio and TV among this older age group.



On demand shows the fastest rate of growth of any media among this older age group since 2021.

Previously 60+ year olds were significantly less likely to use on demand, but in 2023 this group match the overall reach of this media.

Base: All respondents: (2016 n=463; 2018 n=458; 2020 n=463; 2021 n=452, 2023 n=370).

Note: TV viewing includes live and time shifted viewing, in and out of home.

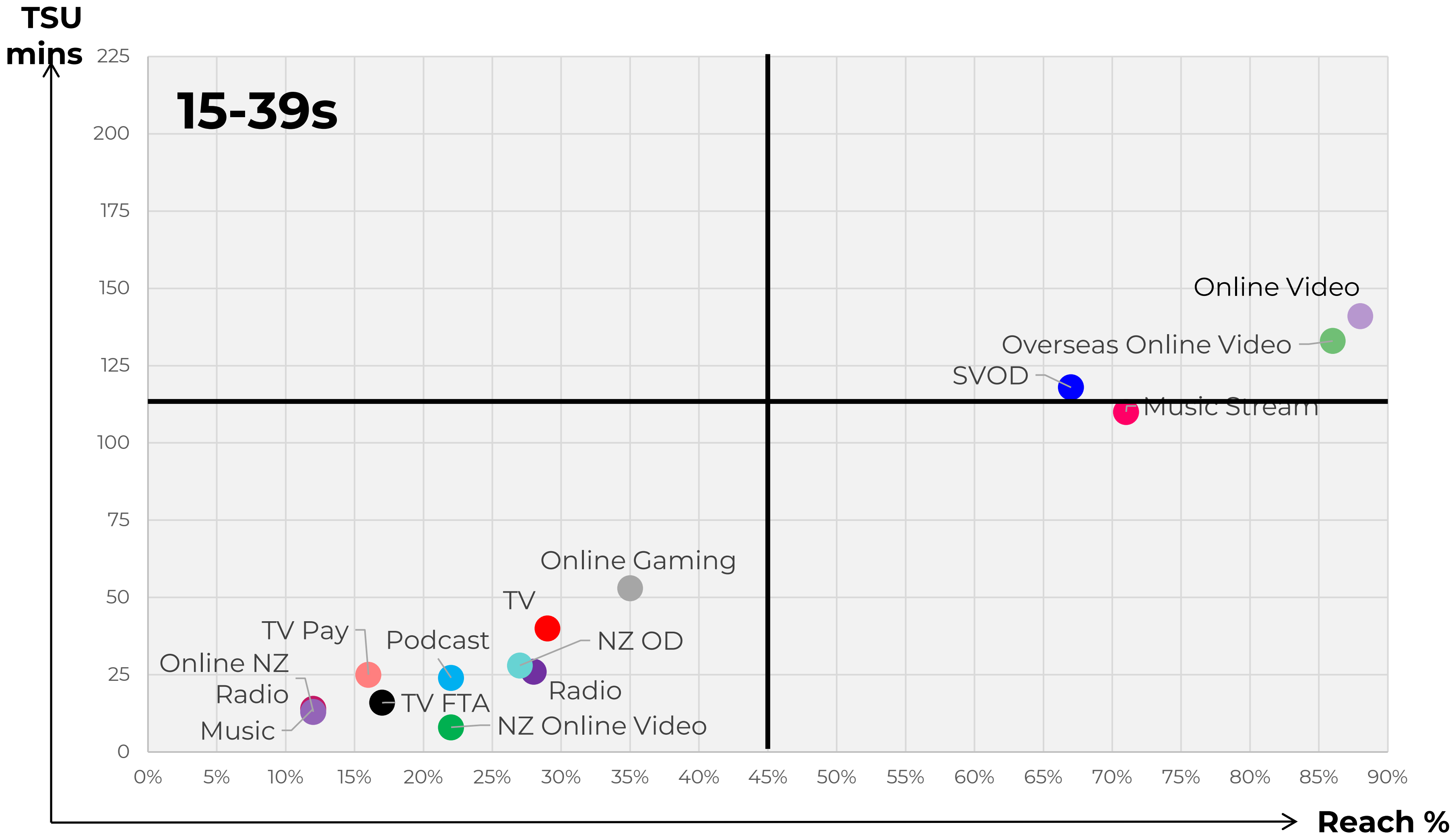
Irirangi Te Motu NZ On Air Glasshouse

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of all media and time spent using 2023

- All 15-39 year olds

Among 15-39 year olds, overseas online video, SVOD and music streaming dominate not only audience sizes but also the time they dedicate to media. With the exception of gaming this age group spend no more than 40 minutes using any other media each day.

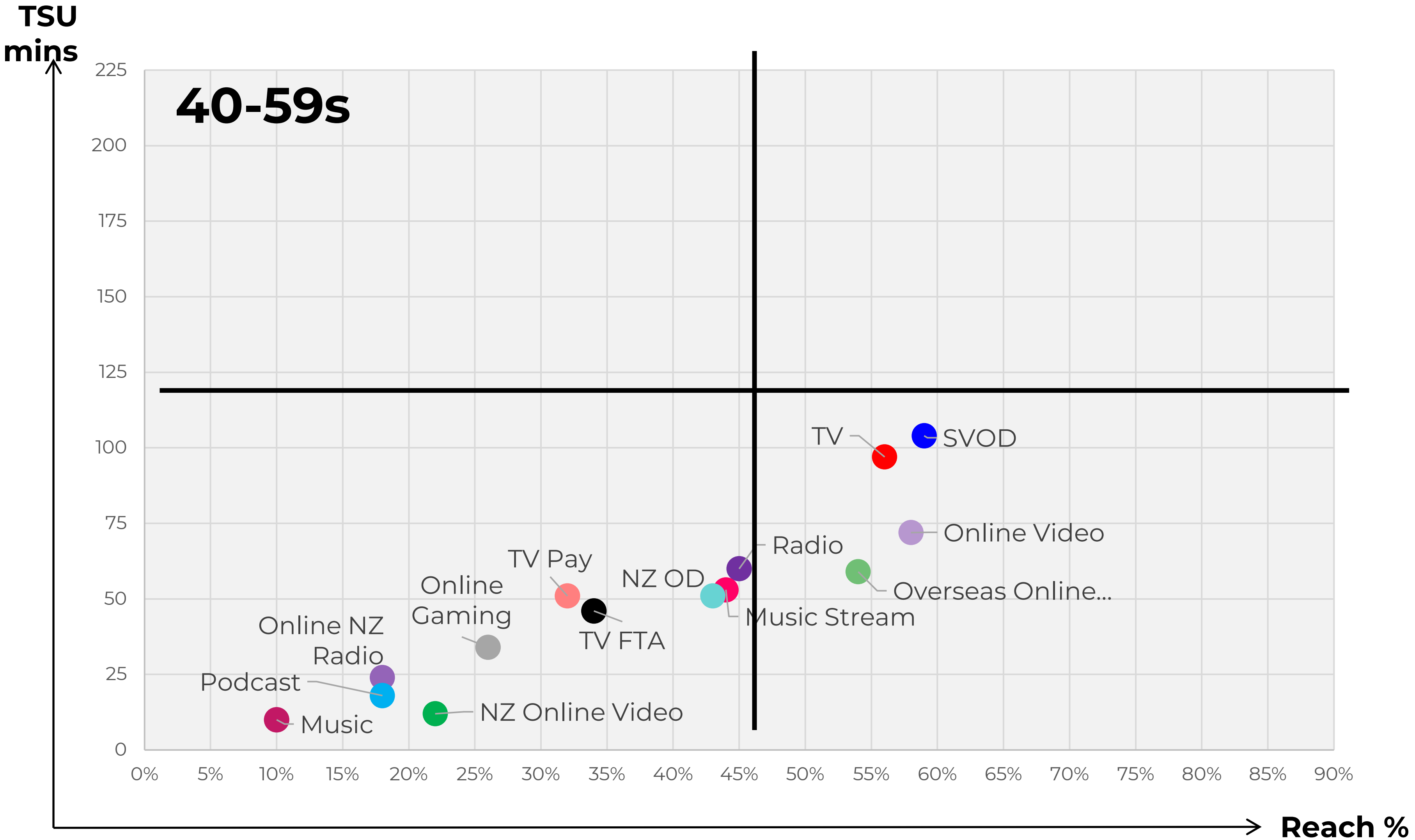


Base: All 15-39s (n=580)

Daily reach of all media and time spent using 2023

- All 40-59 year olds

This chart demonstrates that 40-59s are at the cross-over point in terms of digital media starting to overtake traditional media. Previously TV attracted the biggest audiences and the most time spent. In 2023 the time this age group dedicate to TV viewing has declined below SVOD and there is less gap to the time they spend watching online video.

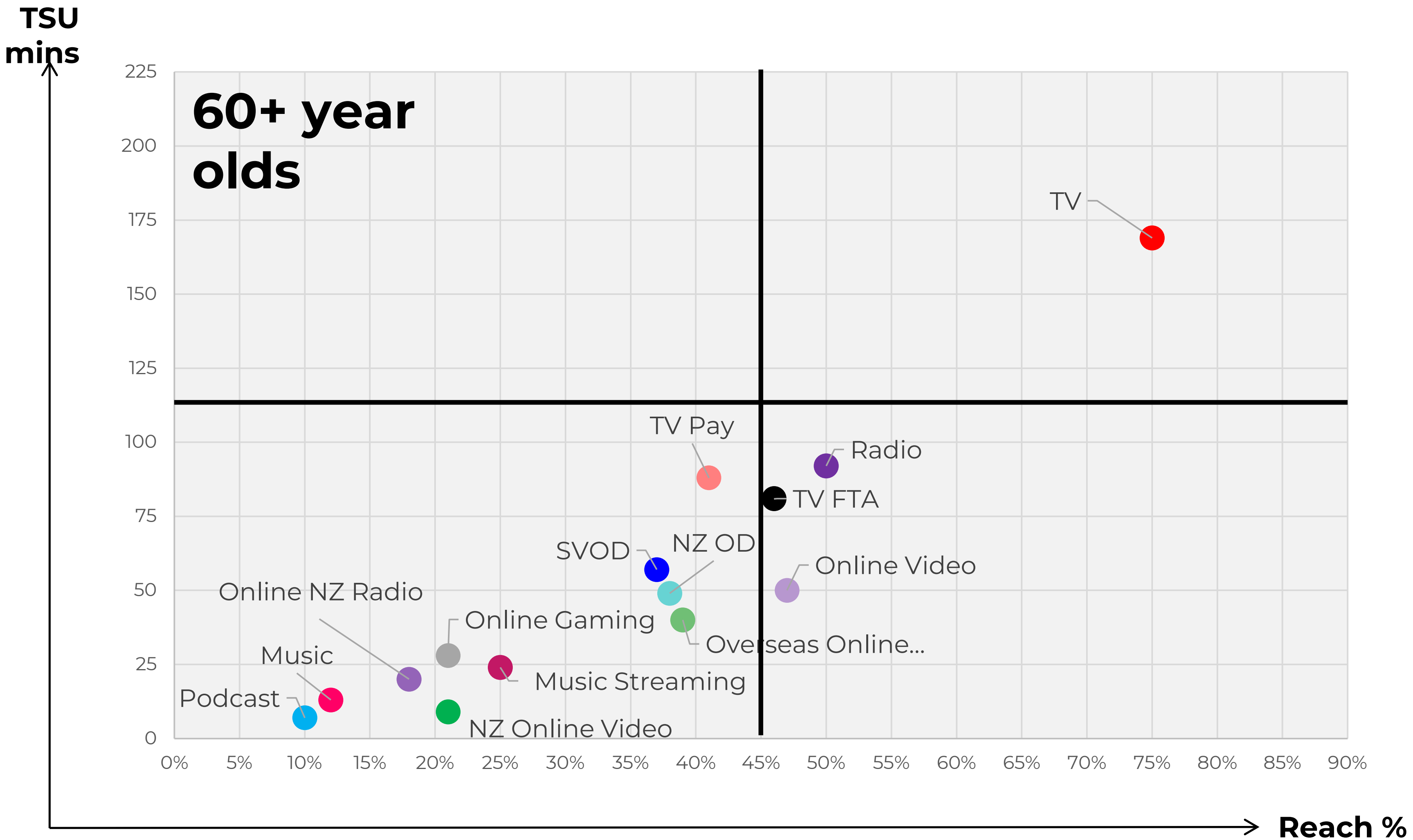


Base: All 40-59 year olds (2023 n=459).

Daily reach of all media and time spent using 2023

- All 60+ year olds

While daily TV and radio audiences show significant decline among 60+ year olds, this group continue to dedicate the most time to these media – especially TV. Online video, SVOD and on demand have started to close this gap, particularly to radio, but traditional media remain most popular among this older group.



Base: All 60+ year olds (2023 n=459).

The interaction of age and lifestage

The generation gap is also reflected in the media behaviour of different lifestages.

The trends among younger New Zealanders are also reflected among…

- Students
- Flatting households
- Young singles and couples without children
- 4+ person homes

The trends among older New Zealanders are also reflected among…

- Retirees
- Empty nesters
- 1-2 person homes

Secondary variables impacting media behaviour

Secondary factors also influence media behaviour though to a lesser and less consistent extent than age, and to a lesser degree than in the past.

Ethnicity

- New Zealanders of Asian descent are significantly less likely to watch TV (29% reach), watch on demand (25%) or listen to the radio (27%), and more likely to watch online video (83%) and listen to streamed music (63%).
- Pasifika are less likely to watch on demand (29%) or listen to the radio (29%), and more likely to watch SVOD (69%), listen to online radio (6%), and listen to streamed music (63%).
- Māori are more likely to watch on demand (42%) and online video (79%).

Gender

- Males are more likely to listen to streamed music (54%), online radio (18%) and music on physical formats (14%).
- Females are less likely to listen to music on physical formats (8%).

Socio-economic level

- The strongest link between media use and socio-economic level is that higher income earners ($80,000+) are more likely to watch SVOD each day (62%), whereas lower income earners are less likely to do so (up to $50,000 = 47%).
- However there are also indications that higher socio-economic groups are also more likely to watch on demand, listen to the radio and to podcasts, whereas lower socio-economic groups are less likely to listen to online radio or to streamed music.

Irirangi Te Motu NZ On Air Glasshouse

Youth (15-24s)

Māori

Pasifika

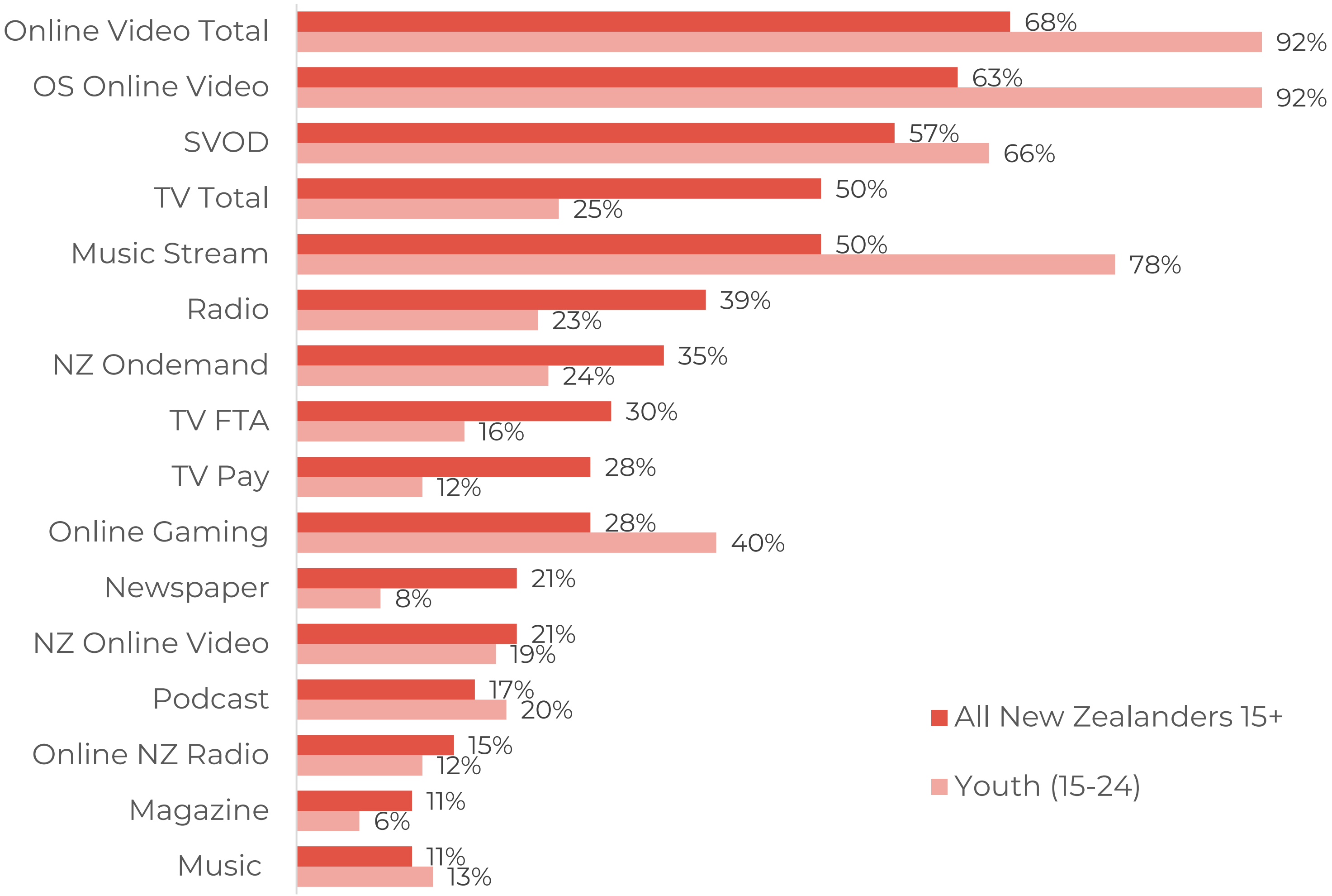
Asian

04 HARDER TO FIND AUDIENCES

Daily reach of media 2023 – Youth (15-24s)

- All New Zealanders 15+
- All Youth (15-24)

This chart shows how different the media usage of youth is from overall New Zealanders. Almost all youth watch overseas online video or listen to streamed music each day. They are also significantly more likely to watch SVOD or play online gaming. There is a big gap between these media and the next most popular options among 15-24s, with TV, radio and on demand each reaching one in four each day.



The daily reach of NZ online video, podcasts, online NZ radio and listening to music on physical formats are the media where youth are most similar to the overall population.

Base: All New Zealanders 15+ (n=1,408), all 15-24 year olds (n=245)

Note: TV viewing includes live and time shifted viewing, in and out of home.

Results ranked based on all New Zealanders

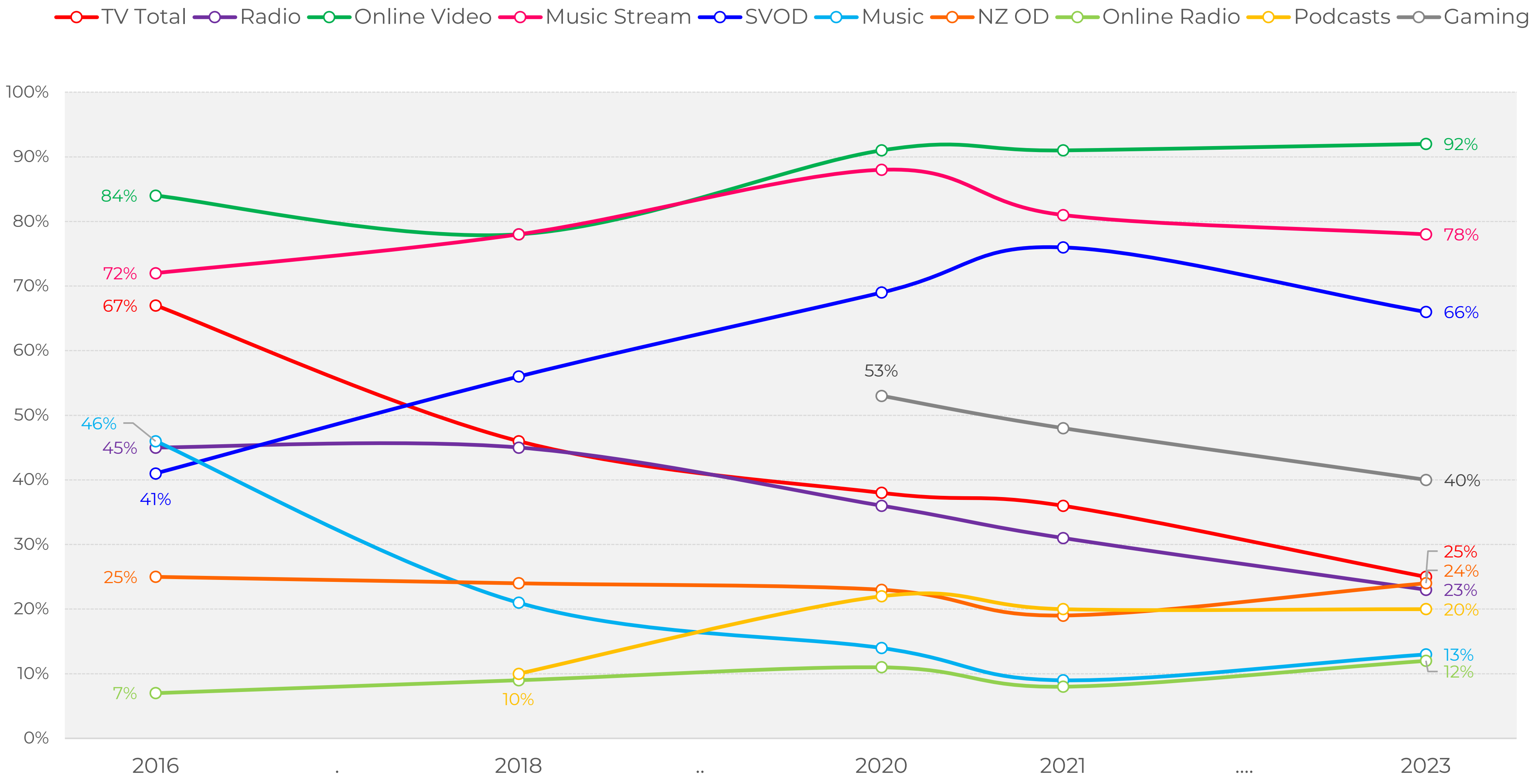
Irirangi Te Motu NZ On Air Glasshouse

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of media over time – Youth (15-24s)

- All Youth 15-24

Online video now dominates 15-24 year old's media use following slight declines in the audiences listening to streamed music or watching SVOD since 2021. Online gaming has also continued the decline evident in 2021. On demand shows the most audience growth among youth since 2021.



Base: All Youth 15-24: (2016 n=249; 2018 n=264; 2020 n=262; 2021 n=251, 2023 n=245).

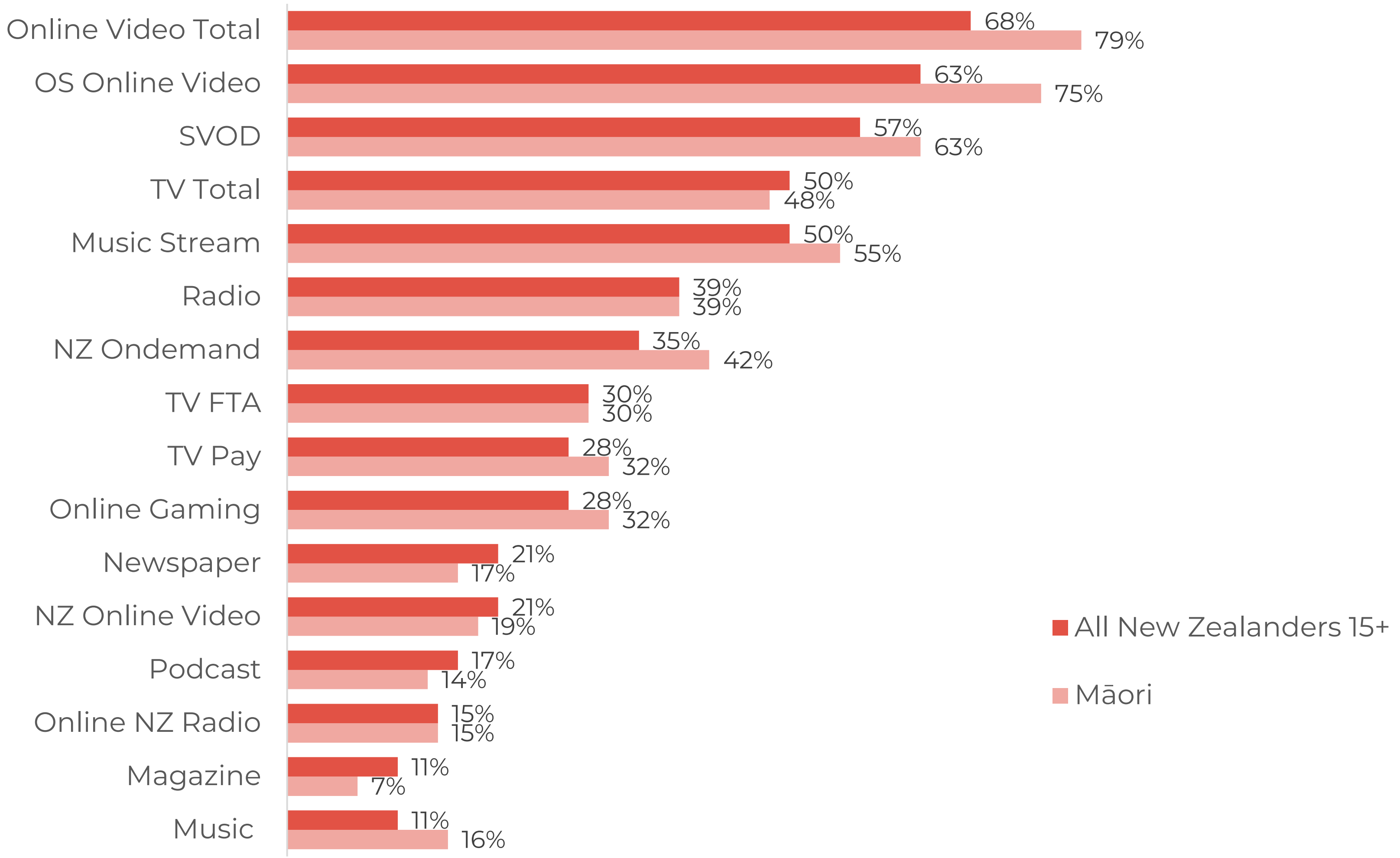
Note: TV viewing includes live and time shifted viewing, in and out of home.

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of media 2023 – Māori

- All Māori 15+

While there is similarity in the media consumption of Māori and all New Zealanders 15+, Māori are more likely to watch the two most popular media of online video and SVOD. On most other media, daily media use closely matches that of the overall population.



Base: All New Zealanders 15+ (n=1,408), all Māori (n=197)

Note: TV viewing includes live and time shifted viewing, in and out of home.

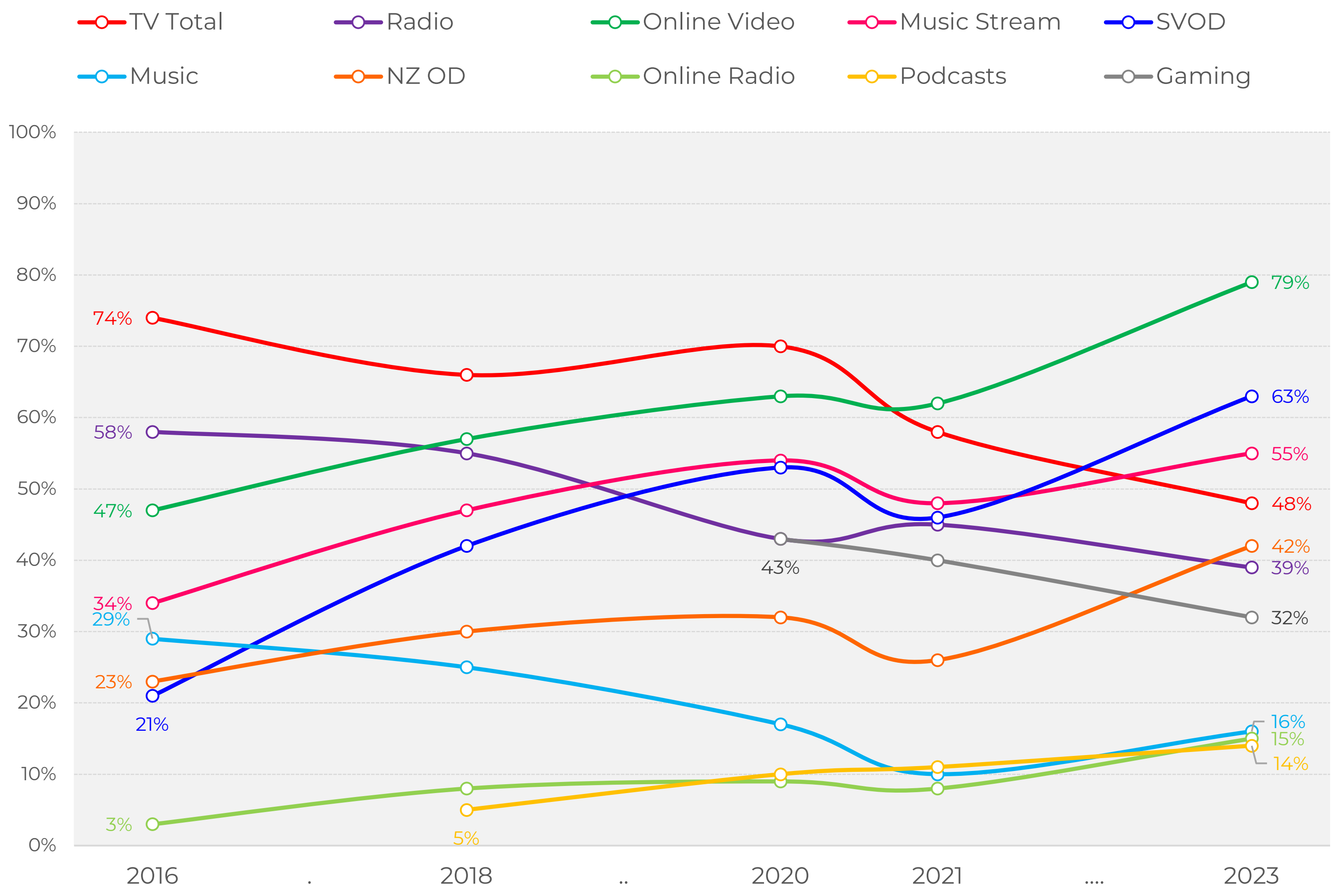
Results ranked based on all New Zealanders

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of media over time - Māori

- All Māori 15+

There has been significant change in the daily audience behaviour of Māori since 2021 with online video, SVOD, streamed music and on demand all showing significant increases in daily audiences while TV, radio and also gaming have continued their decline. Digital media now dominates the media consumption of Māori over traditional media.



Māori are a very young population cohort overall. The 2023 results now more closely match the behaviour of younger New Zealanders overall.

Base: All Māori (2016 n=262; 2018 n=264; 2020 n=245; 2021 n=251, 2023 n=245)

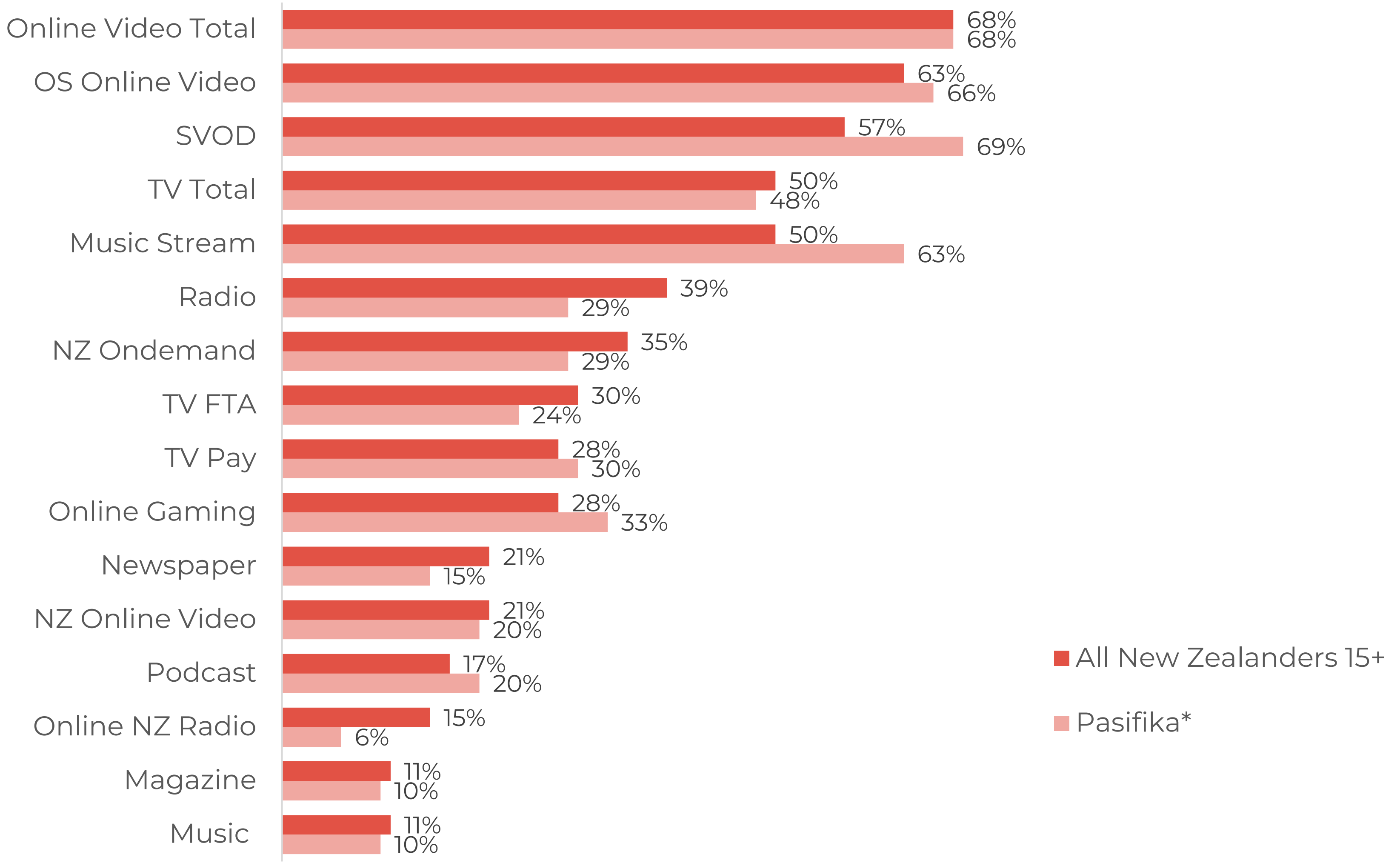
Note: TV viewing includes live and time shifted viewing, in and out of home.

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of all media - Pasifika

- All Pasifika 15+*

Online video, SVOD and streamed music attract the biggest audiences among Pasifika each day, with this group significantly more likely to watch SVOD and listen to streamed music than average. One in two watch TV each day which matches the behaviour of New Zealanders overall.



Base: All New Zealanders 15+ (n=1,408), all Pasifika* (n=94)

Note: TV viewing includes live and time shifted viewing, in and out of home.

Results ranked based on all New Zealanders.

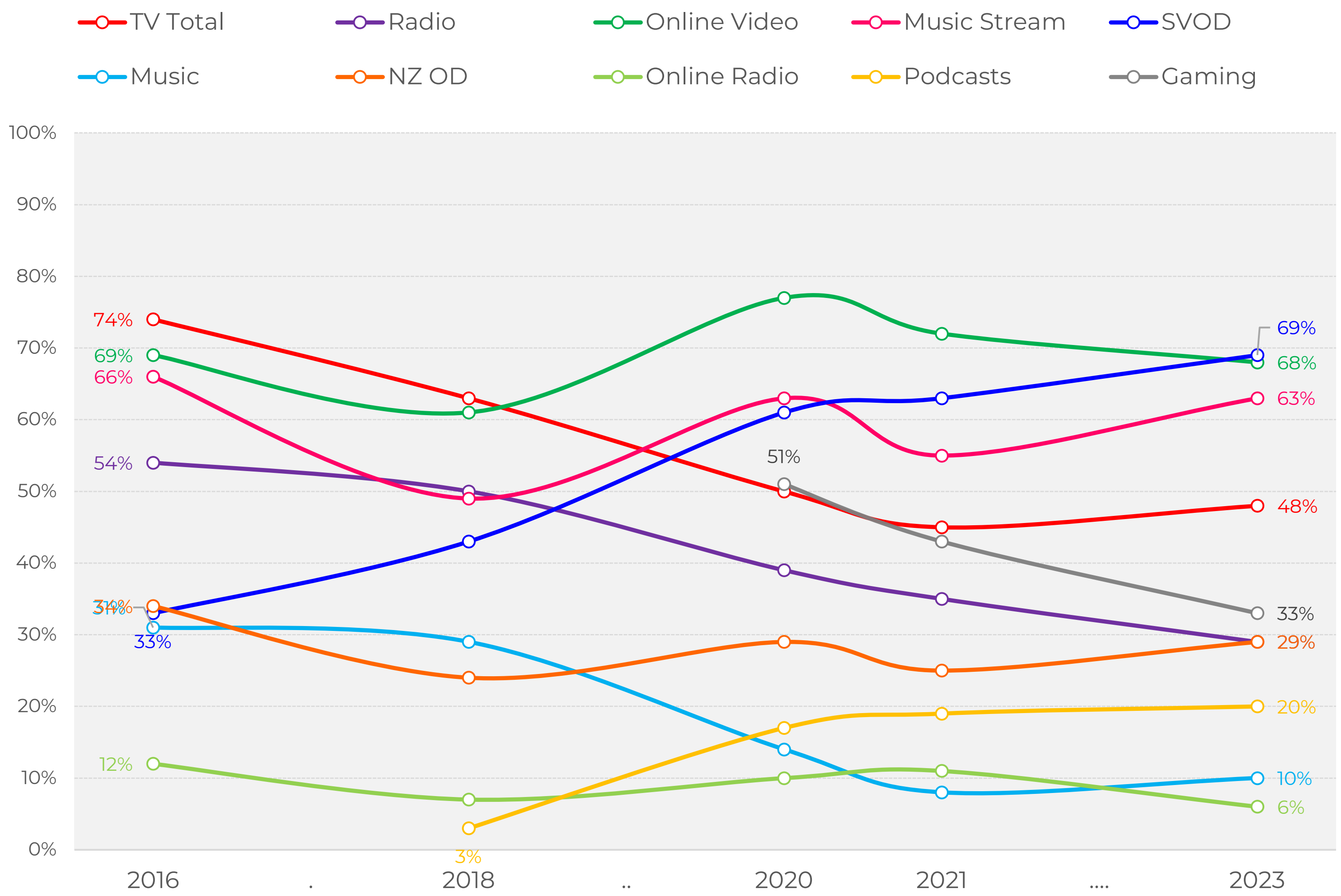
*CAUTION: small sample size

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of media overall - Pasifika

- All Pasifika 15+*

SVOD has continued to grow its Pasifika audience since 2021 and now attracts the same size audience as online video. Streamed music has also grown in popularity with just over six in ten using this media each day. The decline in TV audiences has halted among Pasifika with nearly one in two watching each day, while both radio and online gaming continue to decline.



- Overall there has been less significant change in daily media behaviour since 2021 among Pasifika than other groups.
- Pasifika are also differentiated by the stabilisation of TV audiences in 2023.

Base: All Pasifika*: (2016 n=83; 2018 n=86; 2020 n=110; 2021 n=105; 2023 n=94).

*CAUTION: small sample size

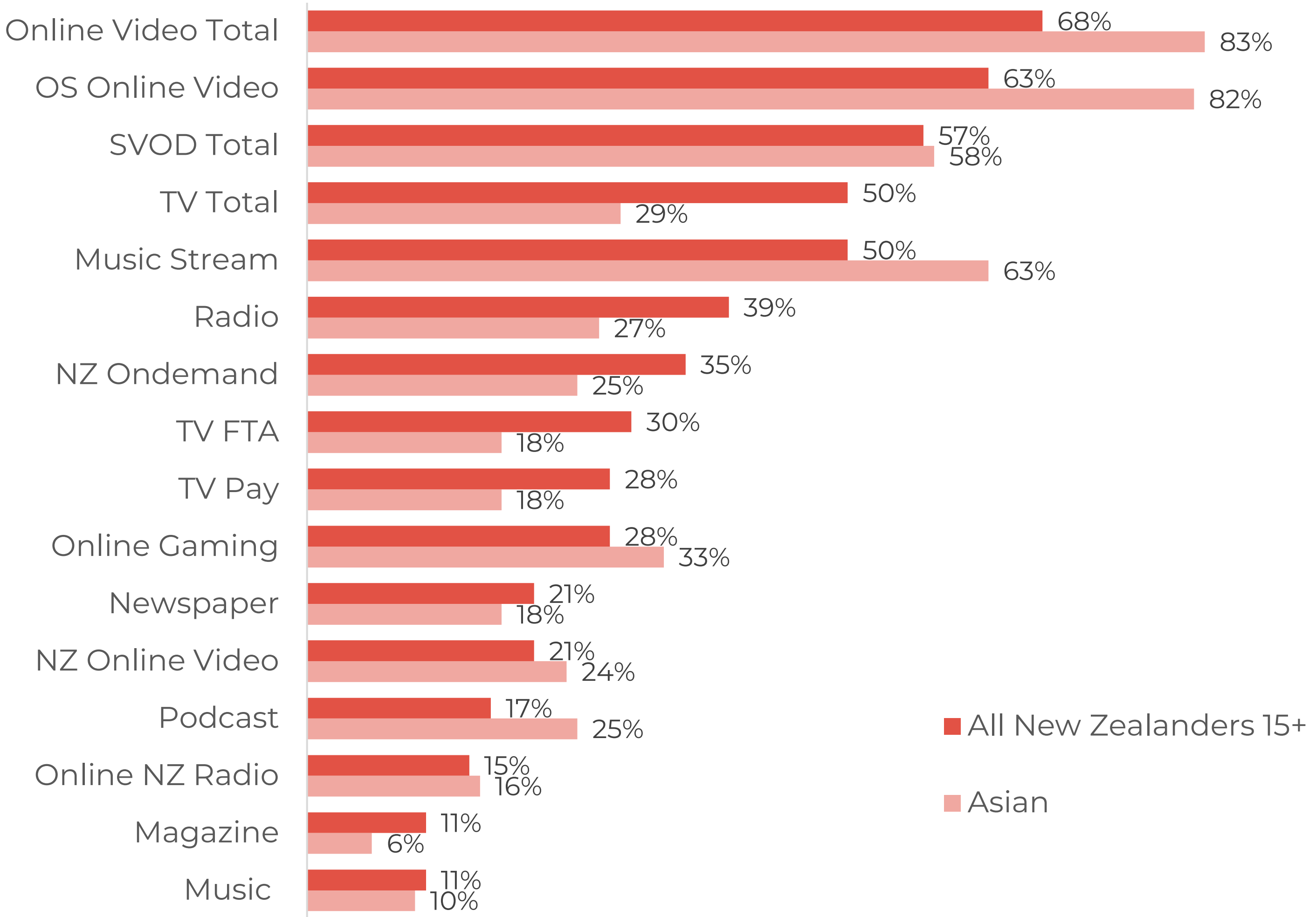
Note: TV viewing includes live and time shifted viewing, in and out of home.

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of all media 2023 – Asian

Similar to New Zealand youth, nearly all Asian New Zealanders watch online video each day and two thirds listen to streamed music. Nearly six in ten watch SVOD each day. Online gaming is the fourth most popular media among this group with one third engaging each day. Asian New Zealanders are also more likely to listen to podcasts, and less likely to watch TV, listen to the radio or watch on demand.

- All Asian 15+



Base: All New Zealanders 15+ (n=1,408), all Asian (n=209)

Note: TV viewing includes live and time shifted viewing, in and out of home.

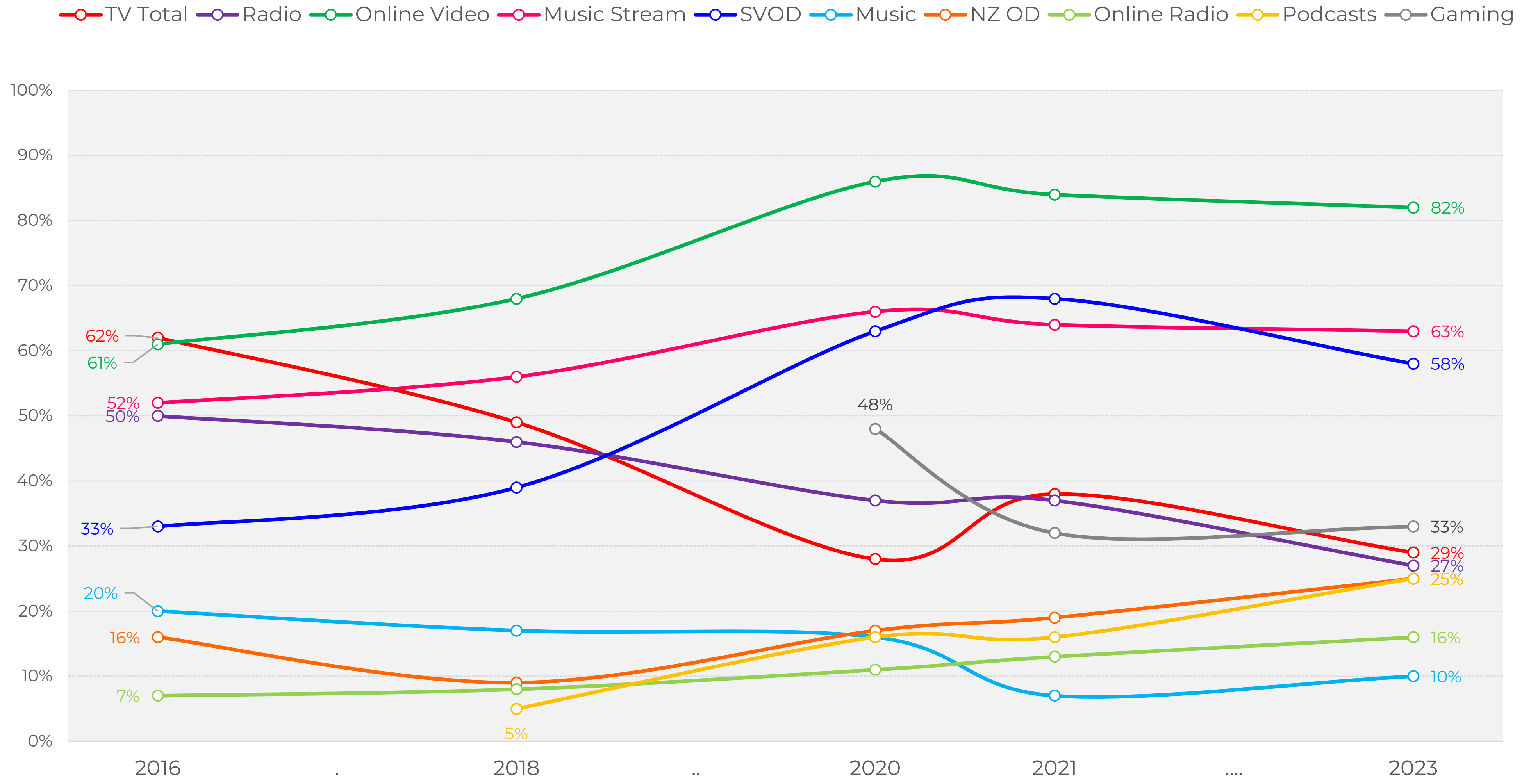
Results ranked based on all New Zealanders.

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of media over time – Asian

- All Asian 15+

The Asian New Zealander audiences watching online video and listening to streamed music are stable since 2021, as is online gaming. However SVOD, TV and radio have all declined, while on demand and podcasts have grown in popularity.



Base: All Asian: (2016 n=160; 2018 n=170; 2020 n=215; 2021 n=202; 2023 n=209).

Note: TV viewing includes live and time shifted viewing, in and out of home.

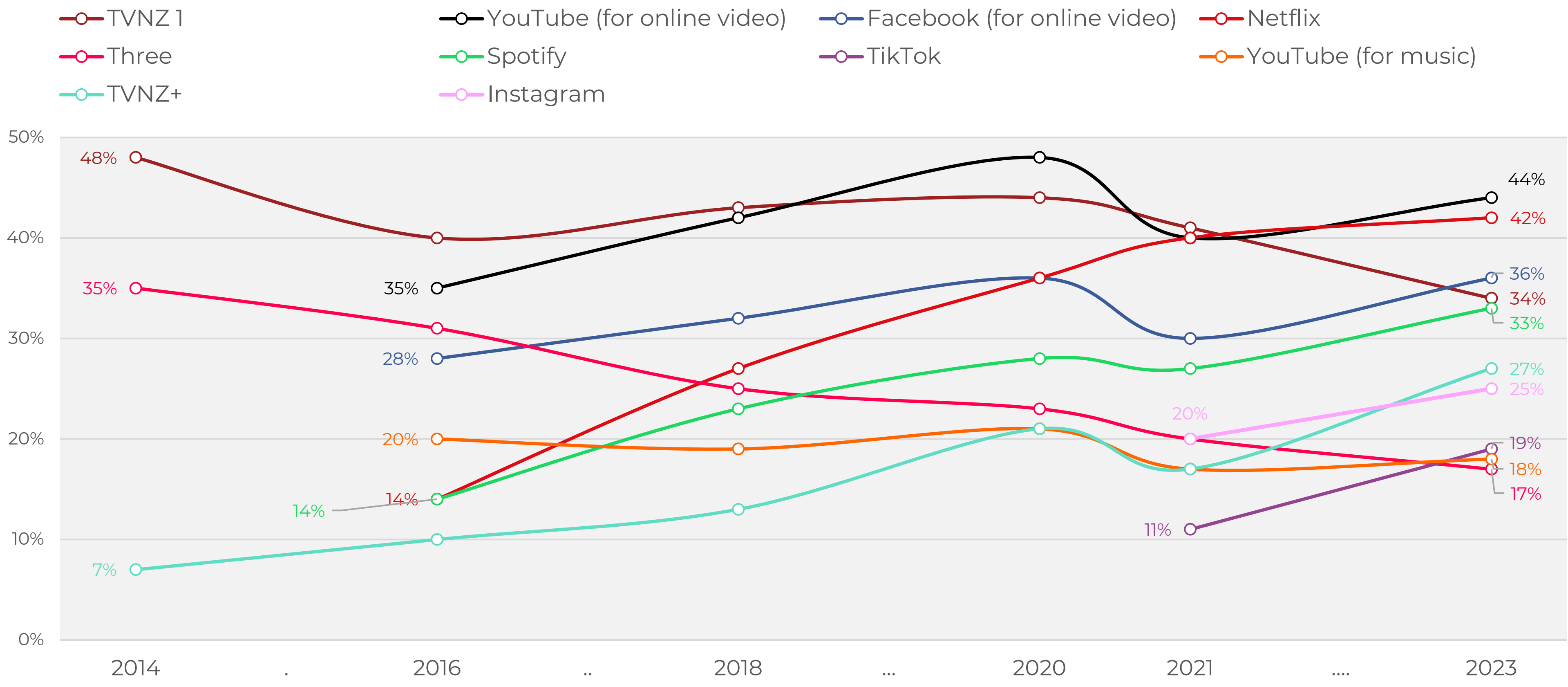
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

05 DAILY MEDIA CONSUMPTION BY CHANNEL, SITE AND STATION

Most popular channels, sites and stations

- All New Zealanders 15+
- Daily reach %
- 15% reach or more

YouTube (for video) and Netflix are the most popular content providers, reaching just over four in ten New Zealanders each day. TVNZ 1's decline means Facebook (for video) is now the third most popular provider, narrowly ahead of Spotify – all three reaching about one in three New Zealanders each day. TVNZ 2 has dropped below 15%, and TikTok's growth results in nearly one in five New Zealanders using it each day.



NEXT TIER:

Disney Plus	Stuff / Play Stuff	TVNZ 2	Snapchat	NZ Herald (video)	Amazon Prime
14%	12%	11%	11%	10%	10%

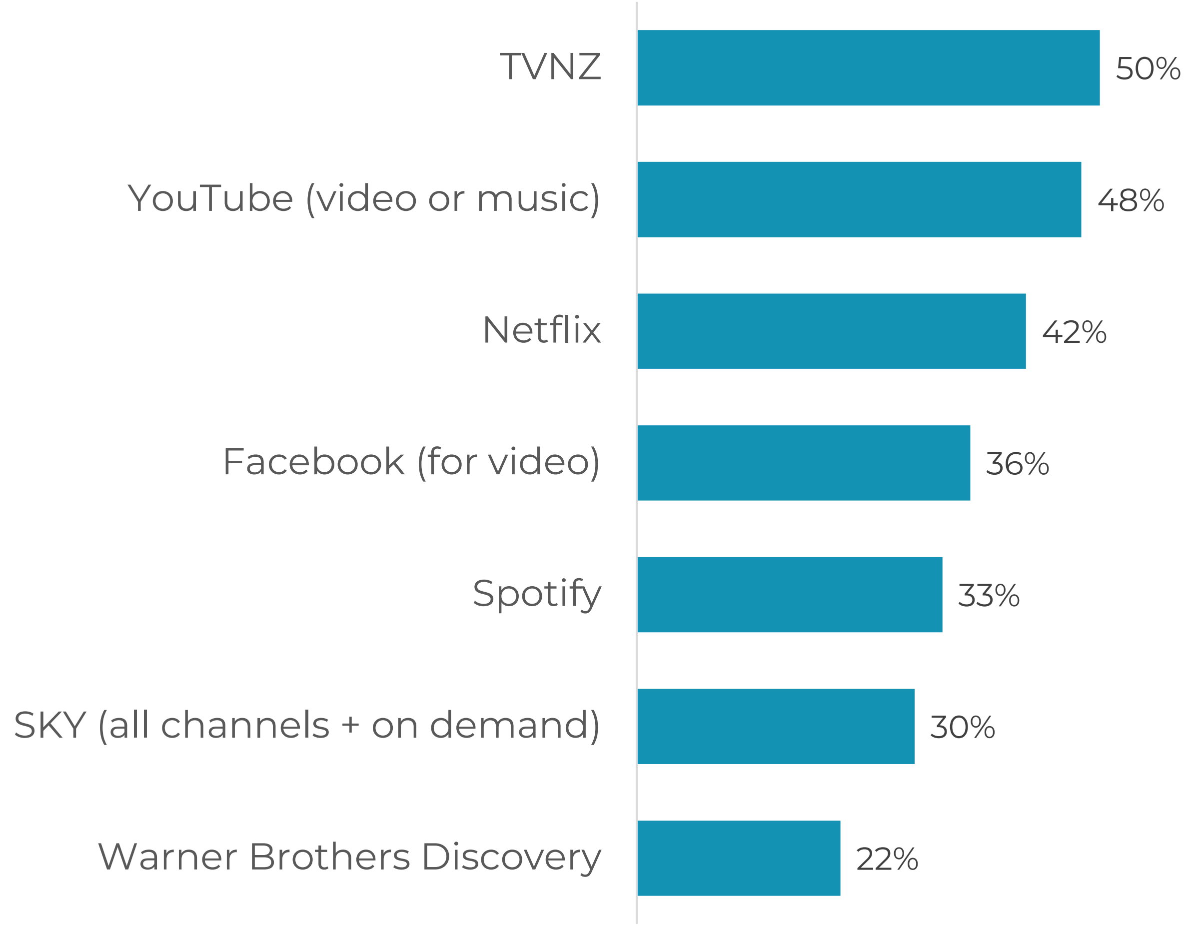
Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q: Which of the following did you use yesterday?

Net daily audiences by provider 2023

When net daily reach is calculated, the combined audience of all TVNZ channels and on demand reaches a slightly bigger daily audience than YouTube.



TVNZ includes:
- TVNZ 1
- TVNZ 2
- Duke
- TVNZ +

Warner Brothers Discovery includes:
- Three
- Rush
- Eden
- HGTV
- Bravo
- ThreeNOW

Base: All New Zealanders 15+:
(2023 n=1,408)

Q: Which of the following did you use yesterday?

Daily reach of overseas online video sites

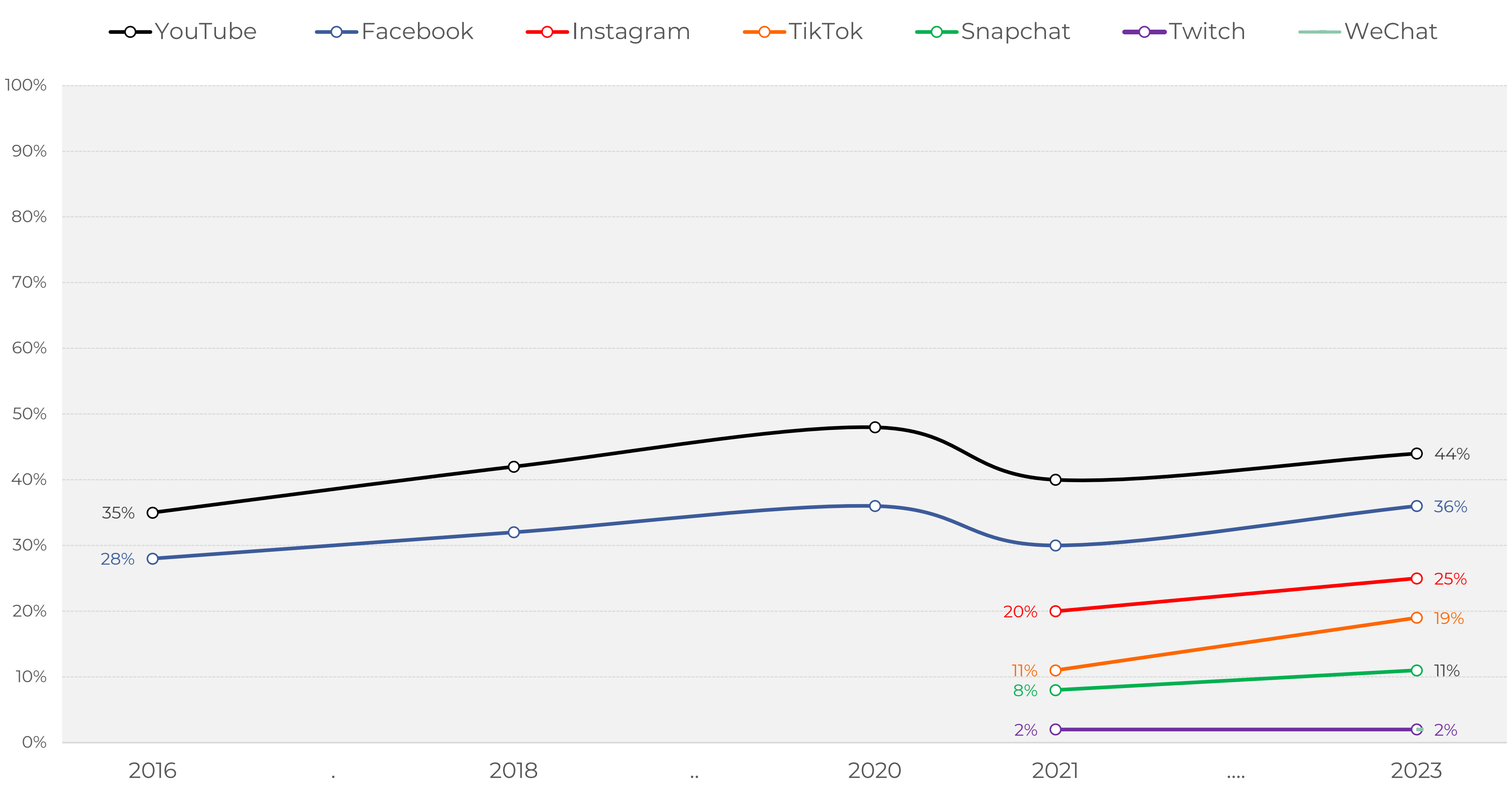
- All New Zealanders 15+
- Daily reach %
- Sites with 2% reach or more

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: In 2021 the survey changed to ask about overseas and NZ online video viewing separately. Questions about the sites used were also separated. Instagram, TikTok, Snapchat and Twitch were included in the survey for the first time in 2021, and WeChat and Twitter were added in 2023.

Time period between 2020 and 2021 is 1 year and others are 2 years

Nearly all online video sites show slight audience growth after a decline in 2021 during the pandemic. YouTube (for video) reaches more than four in ten New Zealanders each day and Facebook (for video) reaches more than one in three. However, the fastest audience growth since 2021 has been TikTok which now reaches one in five New Zealanders each day.



Q: Thinking about yesterday overall, which of the following websites/services did you use to watch video?

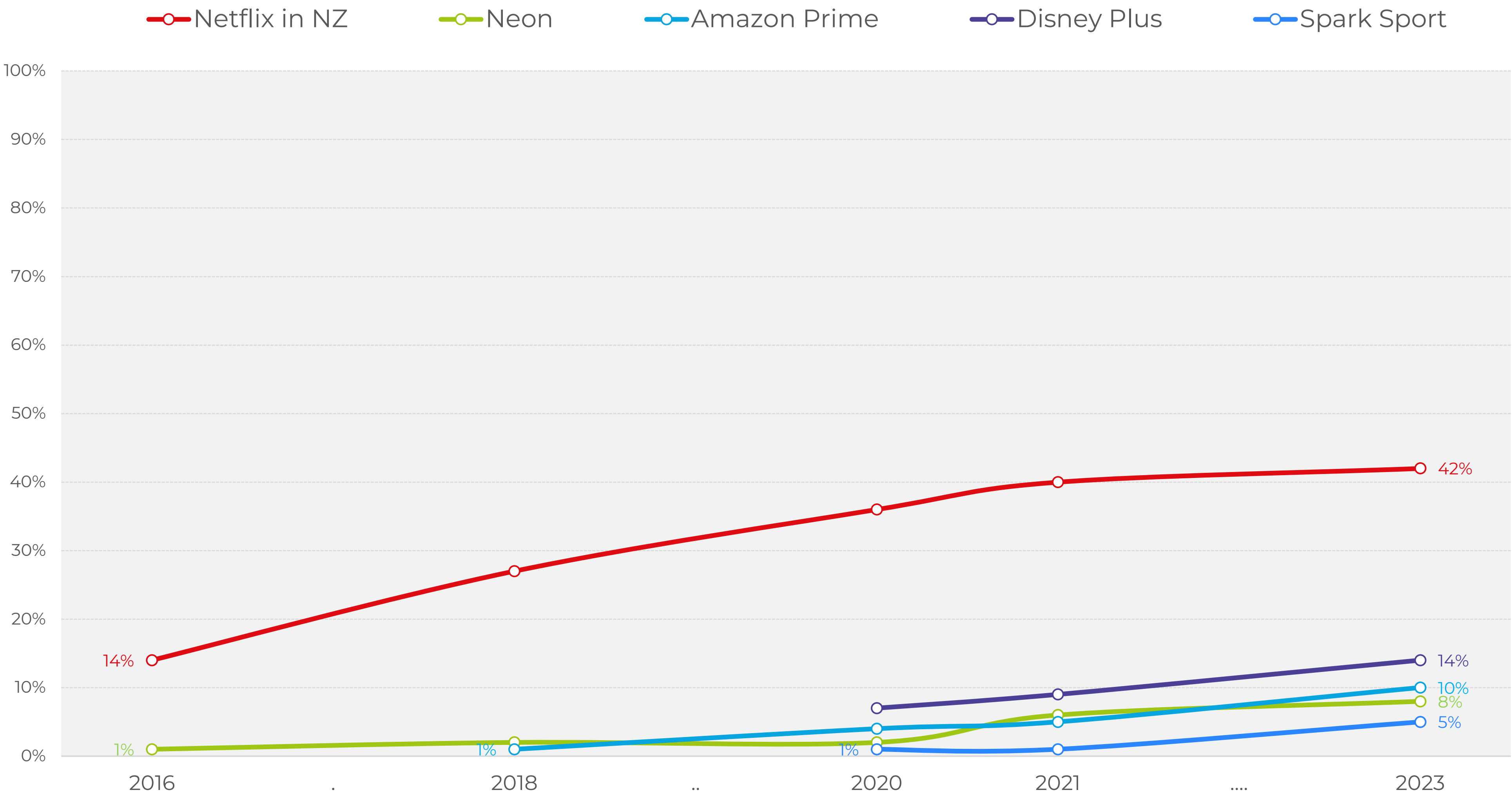
Daily reach of SVOD sites over time

- All New Zealanders 15+
- Daily reach %
- SVOD providers with 5% reach or more

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Time period between 2020 and 2021 is 1 year and others are 2 years

Netflix now reaches more than four in ten New Zealanders each day. While Disney Plus and Amazon Prime show stronger growth than Netflix since 2021, audience sizes on these sites are significantly smaller.

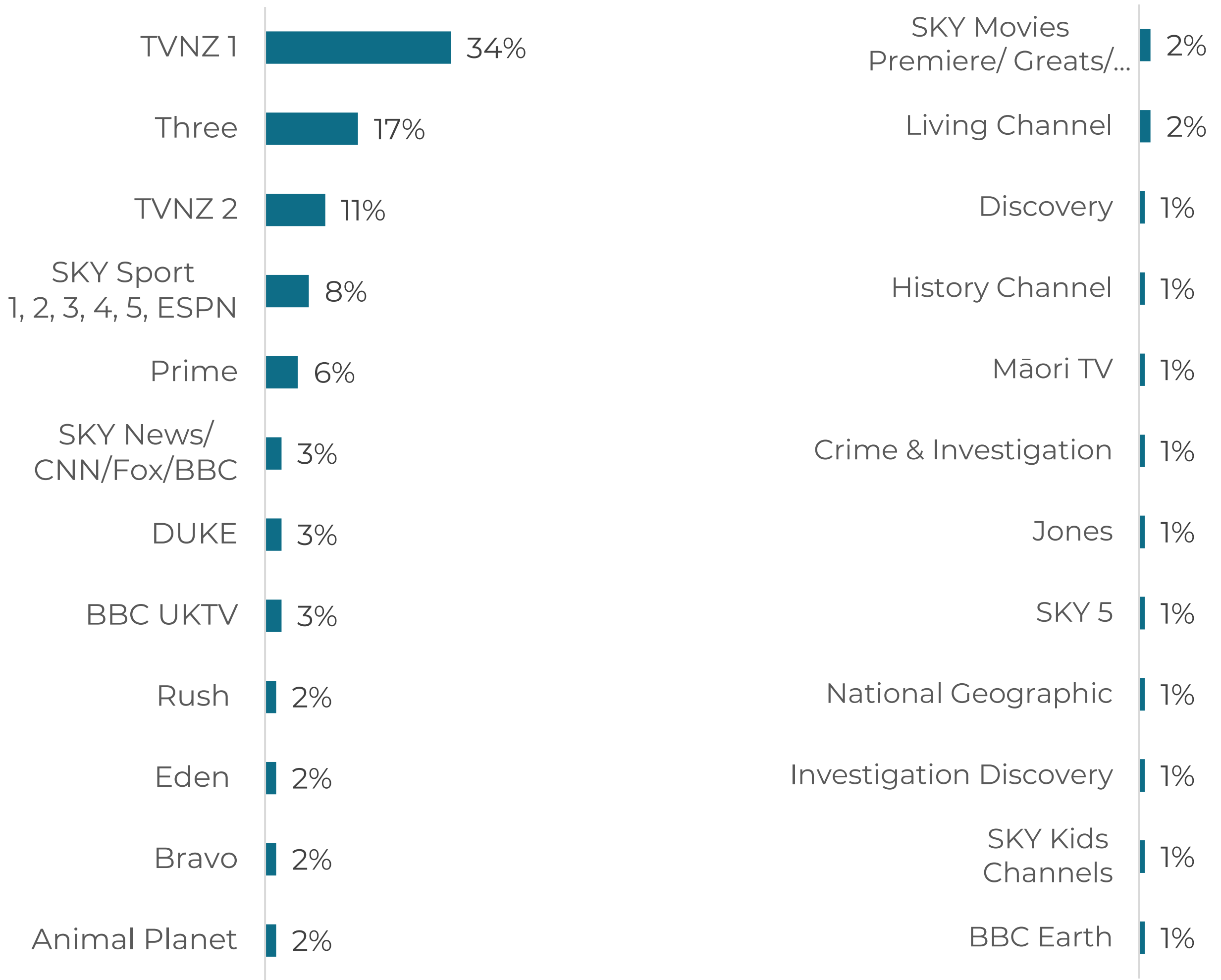


Q: Thinking about yesterday overall, which of the following websites/services did you use to watch TV shows?

Daily reach of TV channels - 2023

- All New Zealanders 15+
- Channels that reach at least 1%.

TVNZ 1 continues to reach the biggest daily audience on TV, reaching one in three New Zealanders each day. Three and TVNZ 2 reach the 2nd and 3rd biggest audiences on TV each day.



- TVNZ 1's audience is more likely to be aged 55 or more (60% reach), middle income earners and SKY TV homes (44%).
- Three's audiences are also more likely to be 55+ year olds (29%) and from SKY TV homes (26%).
- TVNZ 2's audience is more likely to be female (13%).

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408)

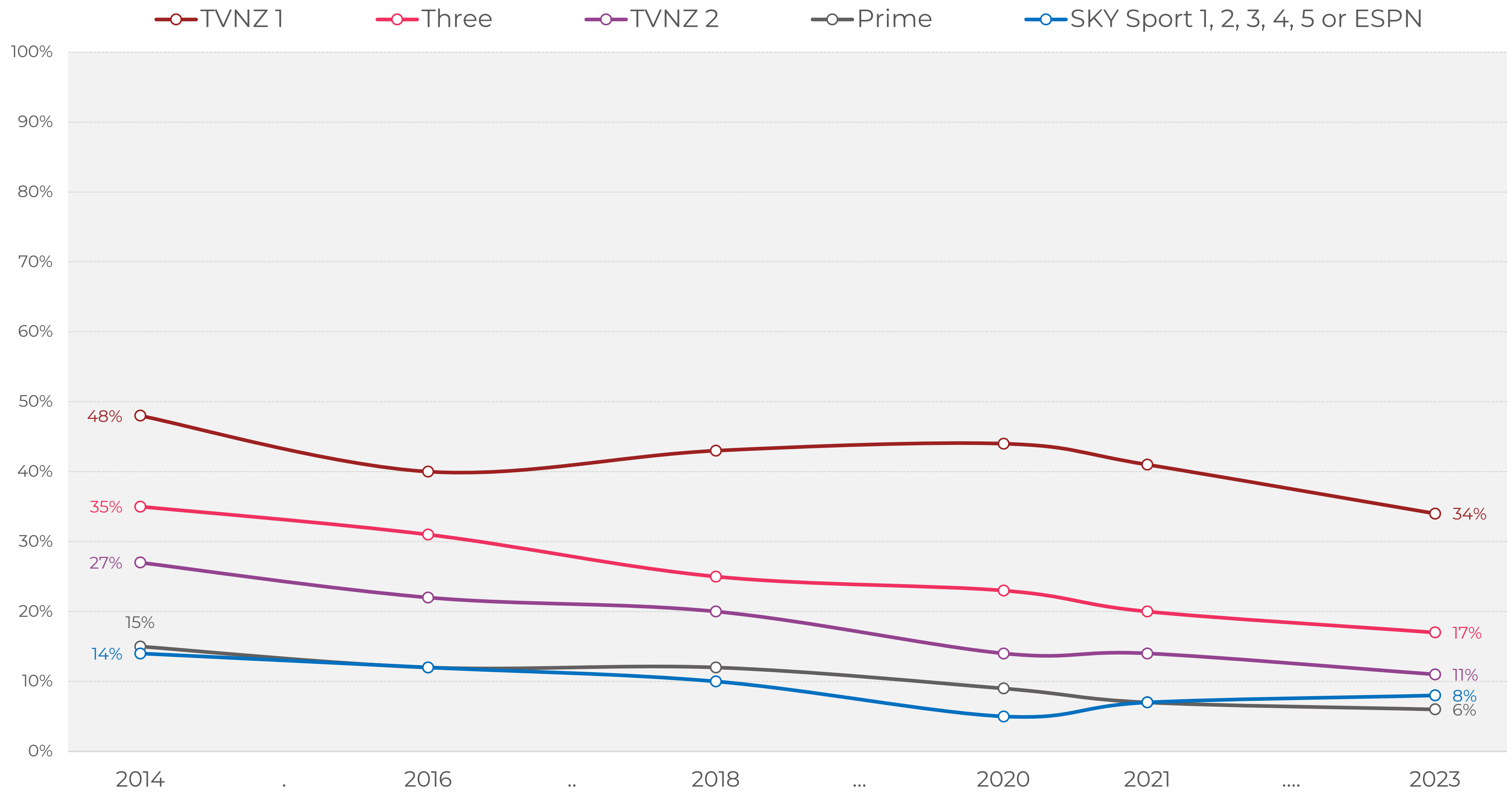
Irirangi Te Motu NZ On Air Glasshouse

Q: Thinking about yesterday, which of the following TV channels did you watch?

Daily reach of TV channels over time

Just five TV channels now reach 5% of New Zealanders or more each day and almost all are showing gradual declines over time. The audience watching SKY Sport channels is more stable.

- All New Zealanders 15+
- Daily reach %
- 5% reach or more



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

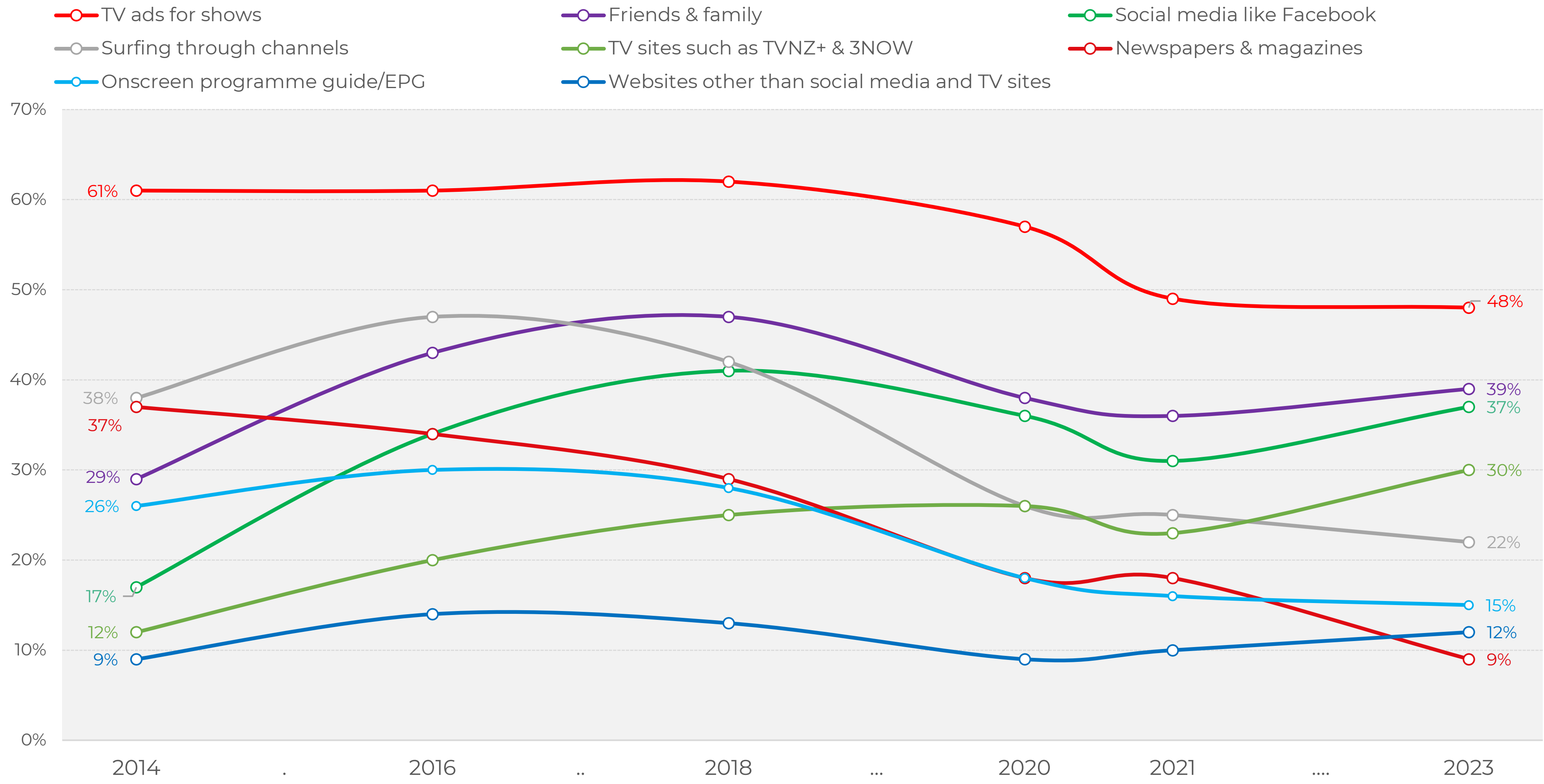
Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q: Thinking about yesterday overall, which of the following TV channels did you watch?

Sources of awareness of NZ made TV shows over time

- All New Zealanders 15+

TV promos remain the most common source of awareness of NZ made TV shows even though their role has declined over time. Word of mouth through friends and family or social media are next most widely used and these are not growing over time. The source that is showing the most growth are TV sites such as TVNZ + and 3NOW - matching the audience growth of this media. The EPG and newspapers/ magazines are declining as sources over time.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q: In which of the following ways do you usually become aware of New Zealand made TV shows?

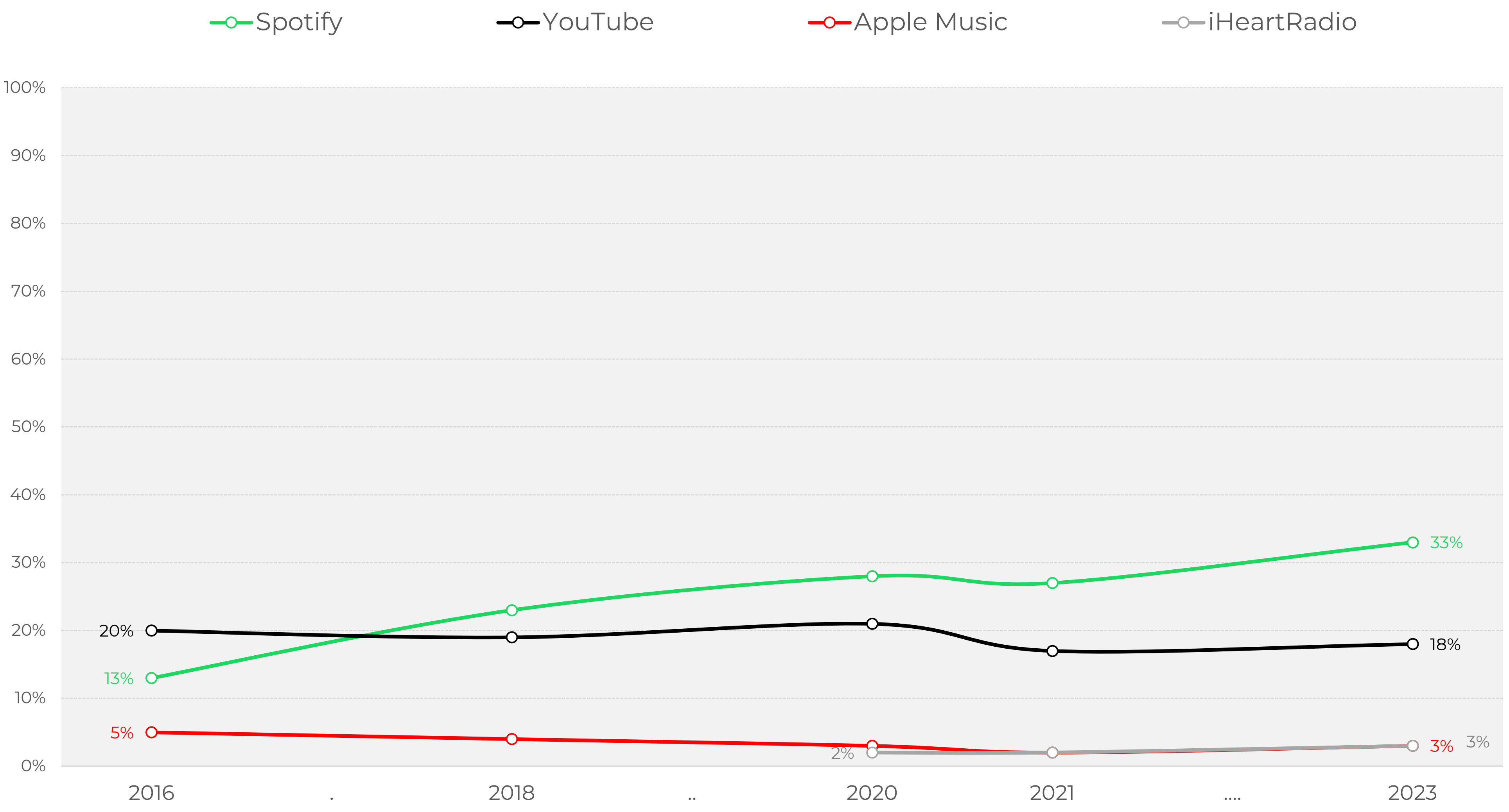
Daily reach of music streaming sites

- All New Zealanders 15+
- Daily reach %
- Sites with 5% reach or more

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Spotify shows significant audience growth since 2021 and now reaches one in three New Zealanders each day, while YouTube (for music) and other main sites are stable.



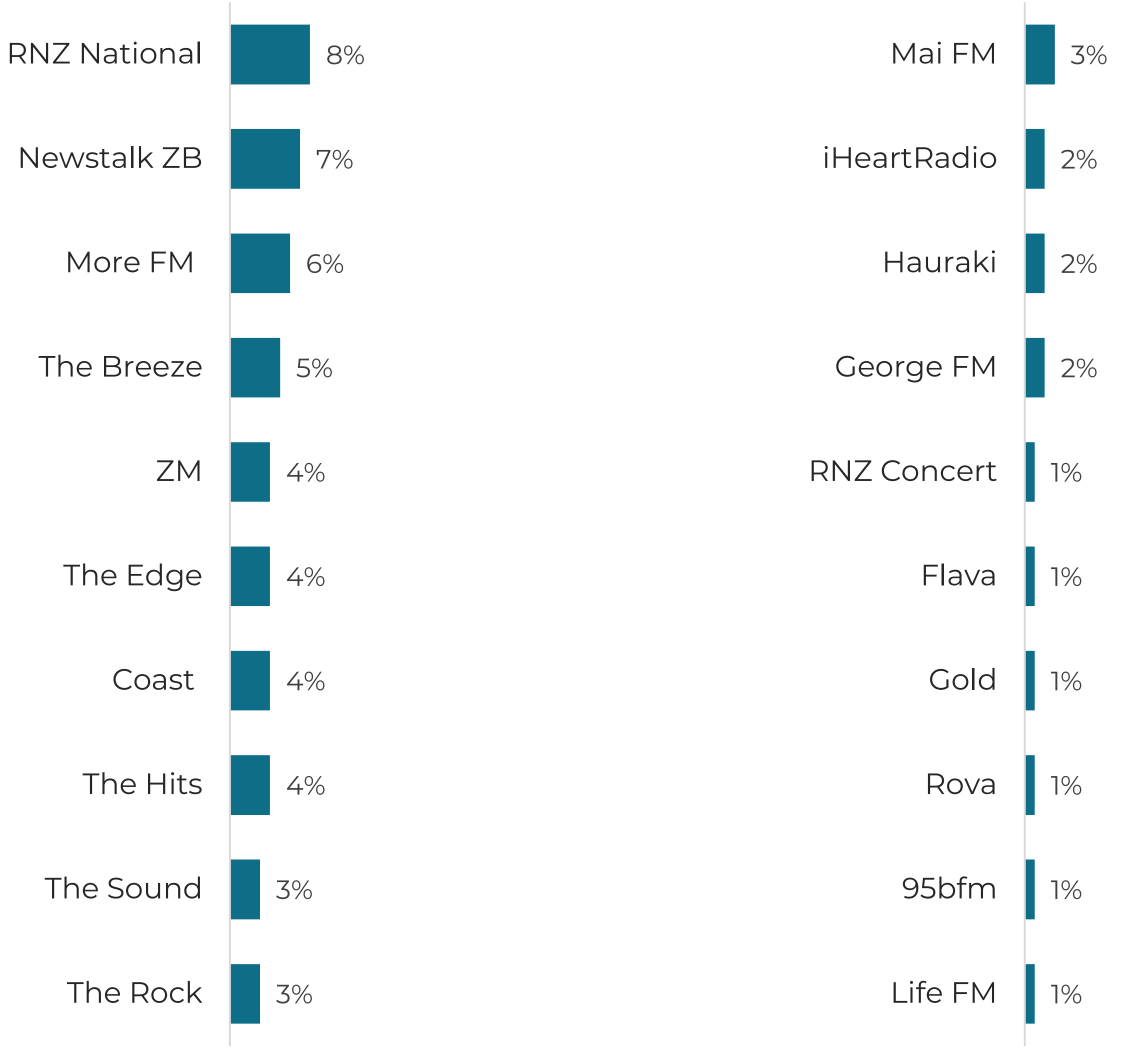
Q: Thinking about yesterday overall, which of the following websites did you use to listen to music?

Daily reach of radio stations - 2023

- All New Zealanders 15+
- Stations with 1% reach or more

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408)

RNZ National reaches just under one in ten New Zealanders each day with Newstalk ZB slightly below this. More FM and The Breeze are the next most popular stations.



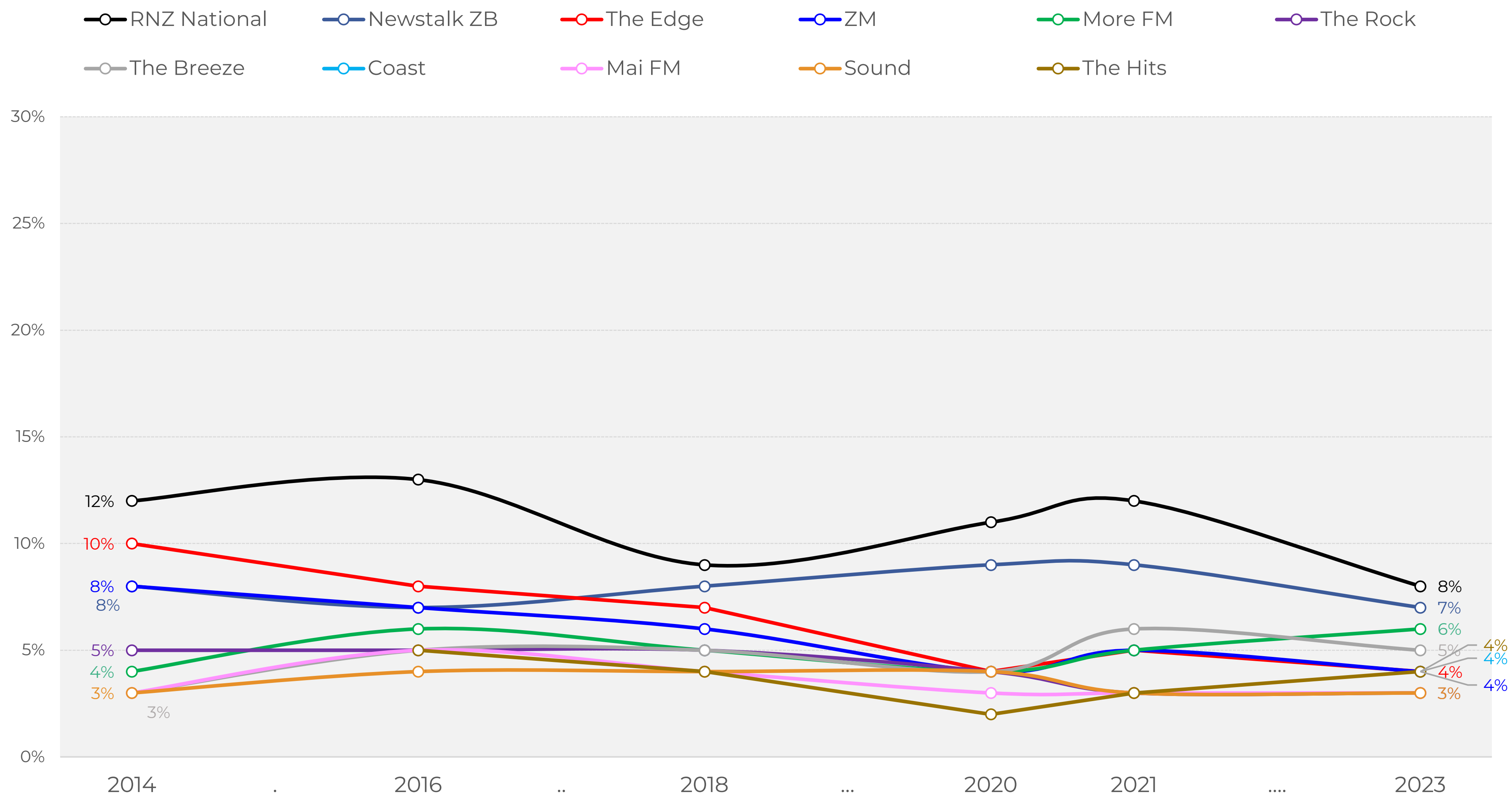
- There is a long tail of radio stations that reach less than 1% of New Zealanders each day.
- The overall radio listening audience skews towards 55+ year olds and SKY TV homes.

Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?

Daily reach of radio stations over time

- All New Zealanders 15+
- Daily reach %
- Stations with 3% reach or more

Apart from small growth in the audiences listening to More FM and The Hits, all radio stations show audience declines since 2021. RNZ National in particular is significantly down from more than one in ten (12%) in 2021.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420, 2023 n=1,408)

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

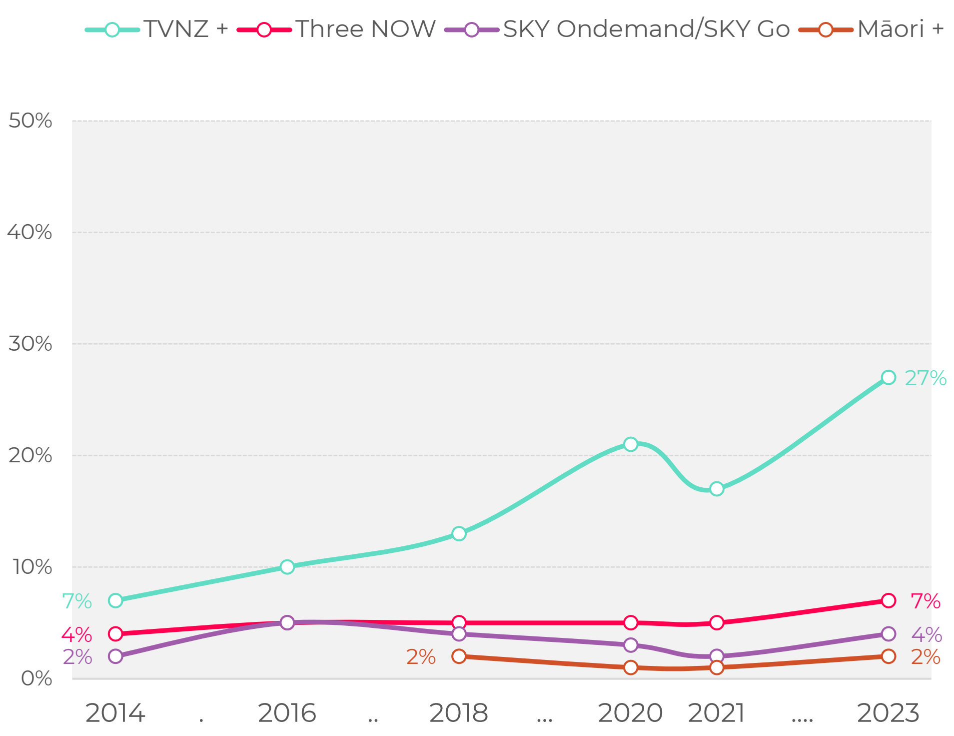
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?

Daily reach & how New Zealanders use on demand

The overall growth of on demand has been mainly driven by TVNZ+ which now reaches more than one in four New Zealanders each day. However all on demand sites show growth since 2021.

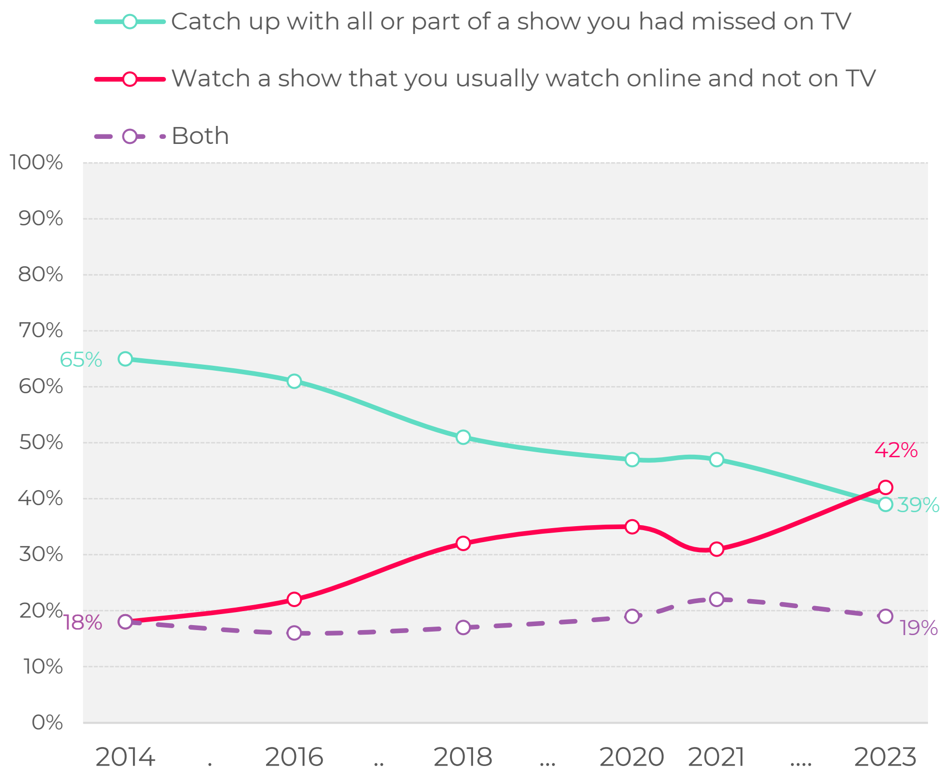
There has also been rapid change in how New Zealanders use on demand sites with most now using it as a primary source of content rather than to catch up on something they missed.

DAILY REACH % - ALL NEW ZEALANDERS 15+



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

HOW USE ONDEMAND – ALL WHO WATCHED ONDEMAND YESTERDAY



Base: Watched Ondemand: (2014 n=166; 2016 n=248, 2018 n=269; 2020 n=387; 2021 n=299; 2023 n=454).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

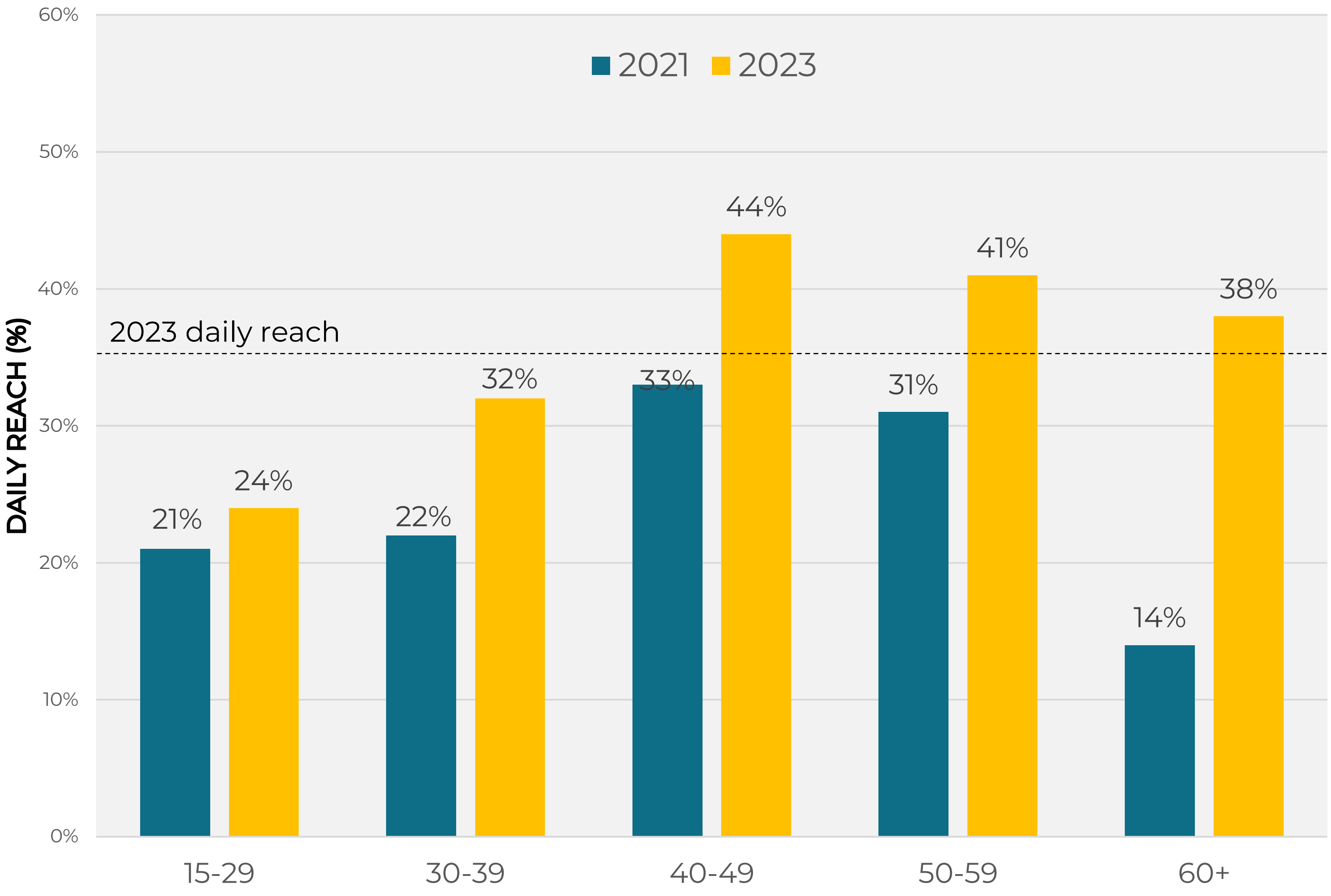
Q: Thinking about yesterday overall which of the following websites or apps did you use?

Q: Thinking about when you used TVNZ, 3Now, Māori or SKY Ondemand yesterday, did you use it to…

A closer look at on demand – 2021 vs. 2023

- All New Zealanders 15+
- % daily reach

There has been a sea change in on demand use since 2021. Not only have audiences grown significantly, but the profile of that audience has changed dramatically as more older New Zealanders have started using the platform., with 40-59 year olds now the most likely to use on demand.



On demand since 2021:

- Higher daily reach – 23% to 35%
- Audiences being drawn from all other media rather than cannibalising TV.
- Now a primary source of content rather than a catch up service, and amore influential source of new TV shows.
- Audience growth from lighter users resulting in lower engagement among viewers.

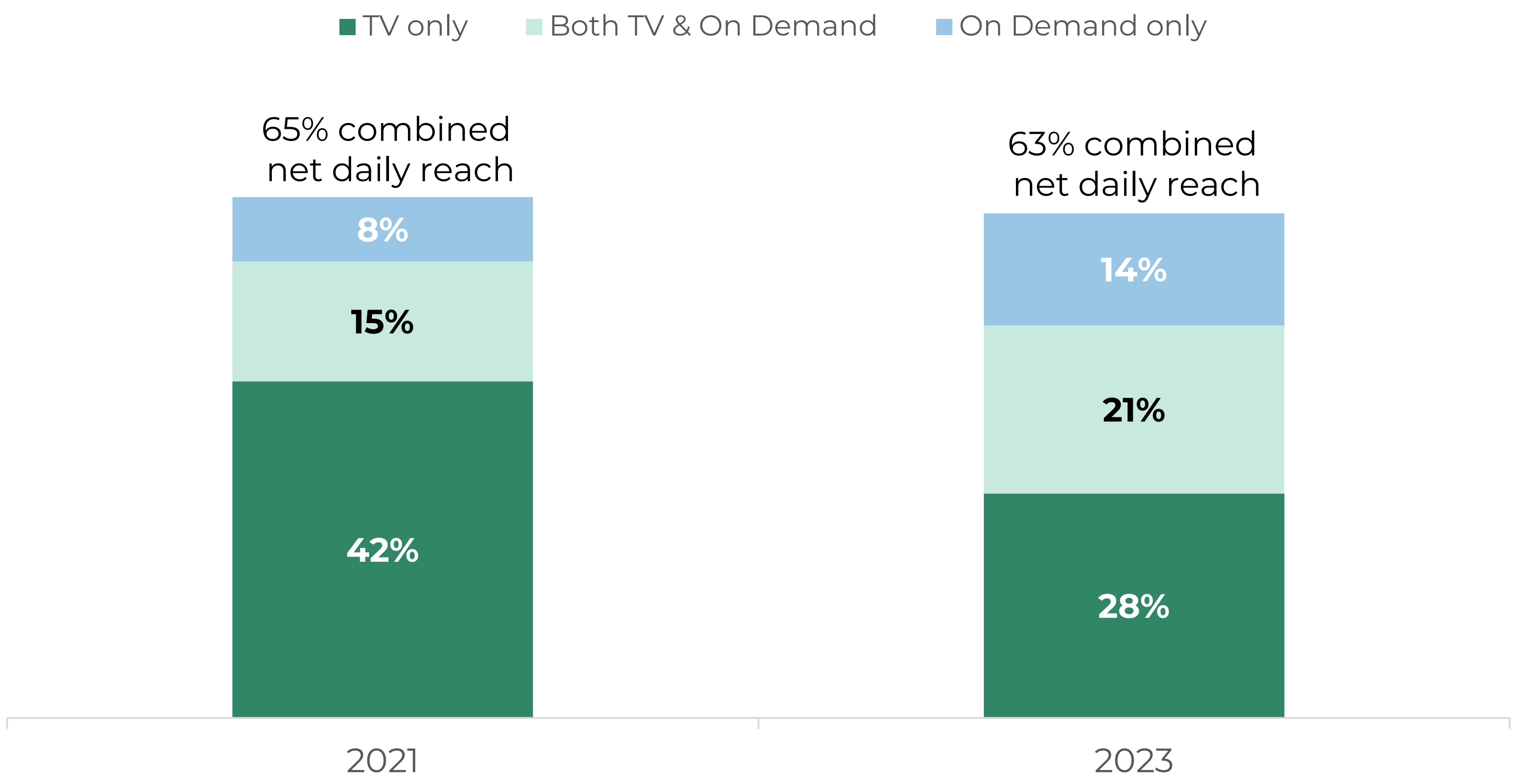
Base: All respondents: (2021 n=1,420; 2023 n=1,408)

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Net daily reach TV & on demand 2021 - 2023

- All New Zealanders 15+
- % daily reach

While the overall combined daily reach of TV and on demand has not changed significantly since 2021, the mix of these two media has changed.



Base: All New Zealanders 15+:
(2021 n=1,420; 2023 n=1,408)

Note: This chart summarises the mutually exclusive daily audiences watching TV and/or ondemand. TV viewing includes live and time shifted viewing, in and out of home.

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Daily reach of NZ online video sites

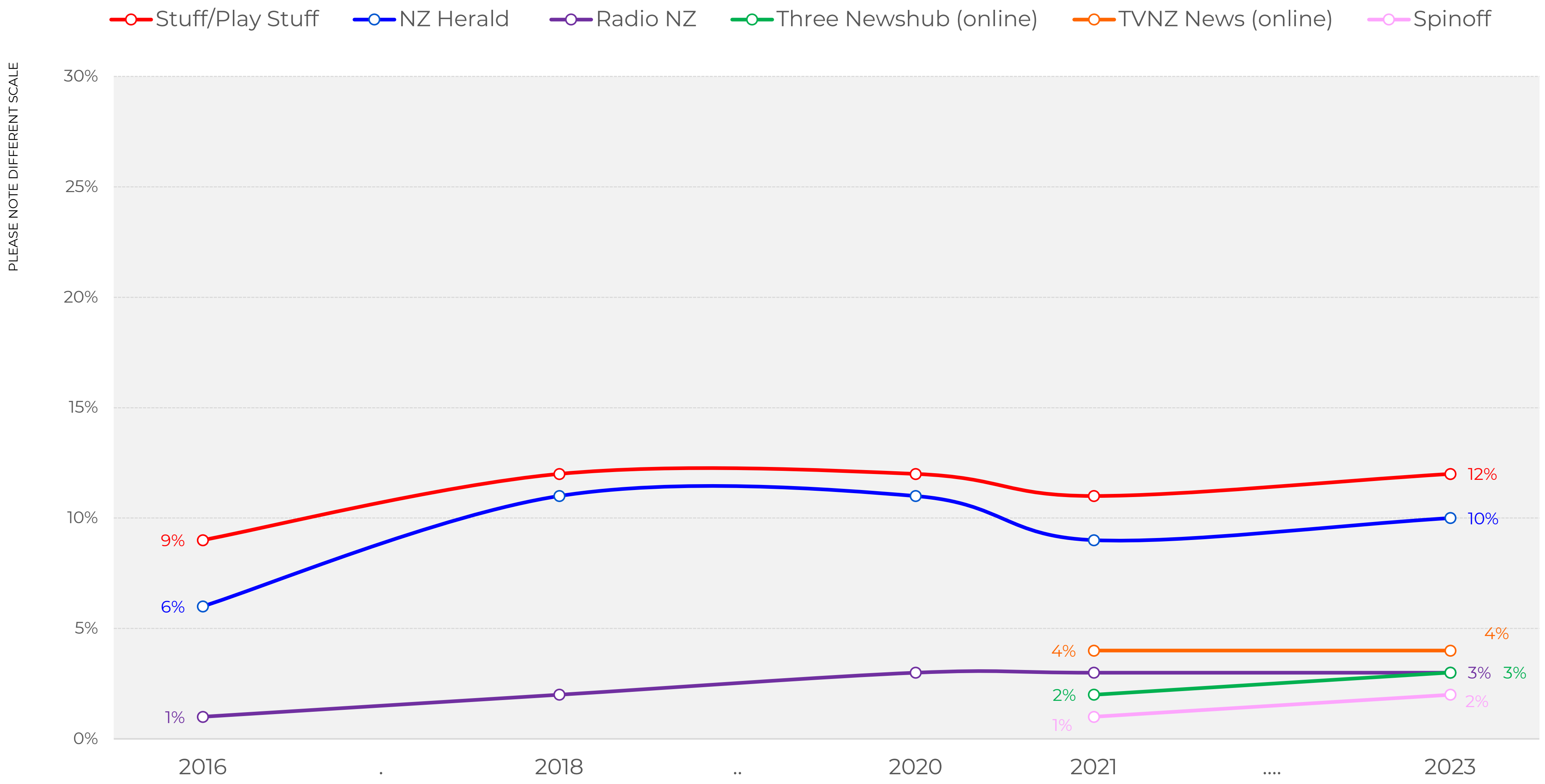
- All New Zealanders 15+
- Daily reach %
- Sites with 2% reach or more

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: In 2021 the survey changed to ask about overseas and NZ online video viewing separately. Questions about the sites used were also separated. TVNZ News, Three Newshub, The Spinoff and Newsroom were included in the survey for the first time.

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Compared to other media there has been little change in the audiences watching online video on NZ based sites. Stuff and NZ Herald continue to reach about one in ten New Zealanders each day.



Q: Thinking about yesterday overall, which of the following websites did you use to watch video?

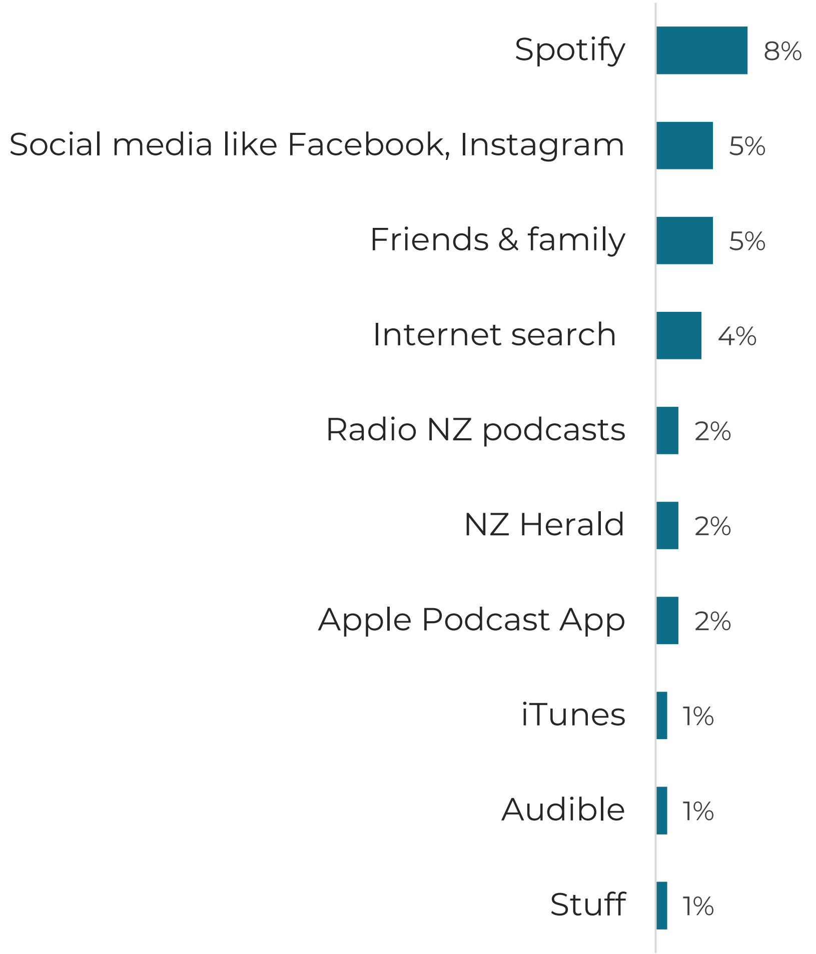
Source of new podcasts - 2023

- All New Zealanders 15+

Base: All New Zealanders 15+ (2023 n=1,408)

Note: Response options changed in 2021 to include "Internet Search."

Spotify is the most common source of new podcasts, followed by social media and word of mouth from friends and family.

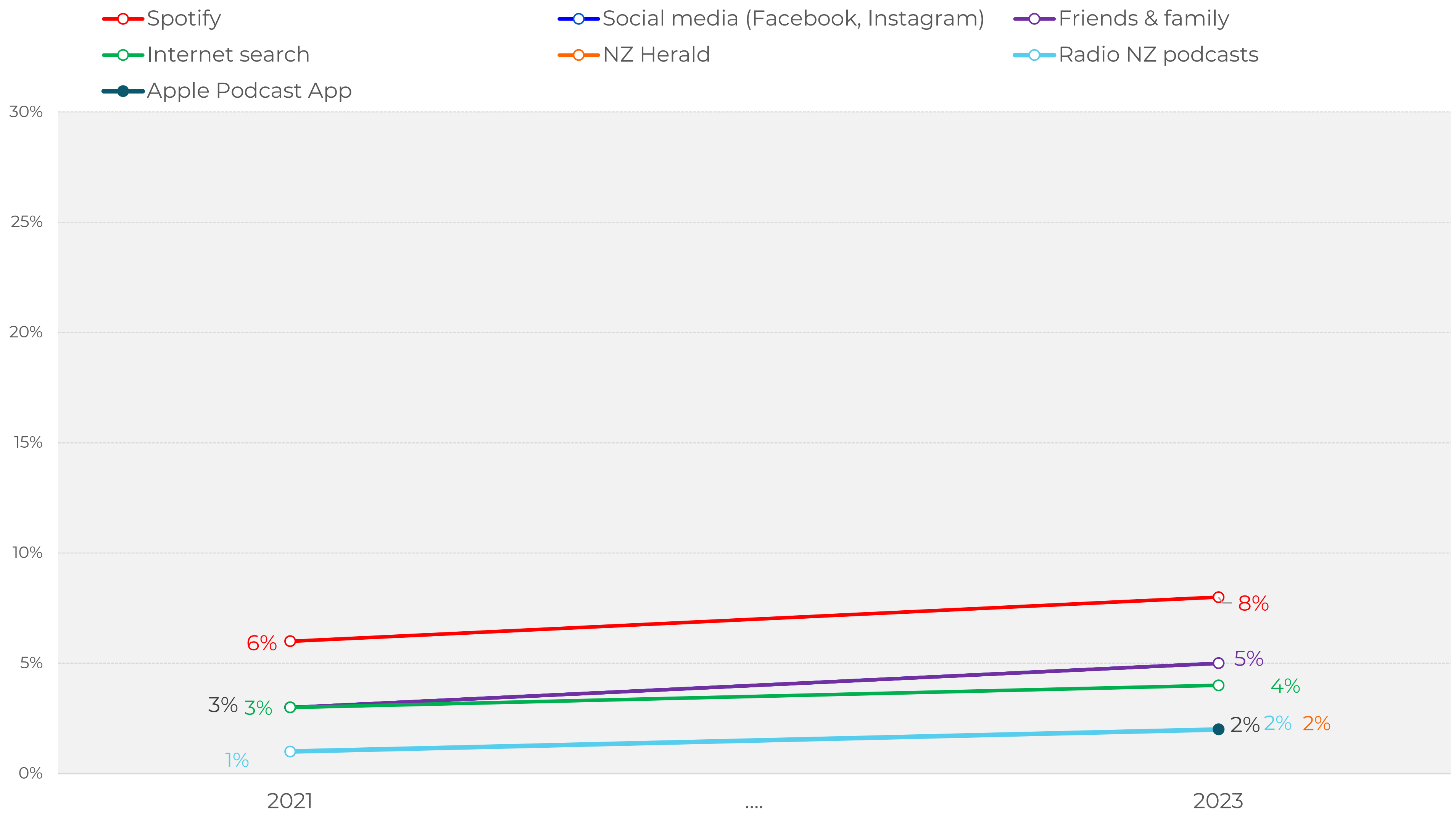


Q: In which of the following ways do you find new podcasts?

Sources of podcasts over time

- All New Zealanders 15+
- Sources used by 2% of New Zealanders or more

The number of New Zealanders using the main sources of podcasts has increased slightly since 2021.



Base: All respondents: (2021 n=1,420; 2023 n=1,408).

Q: In which of the following ways do you find new podcasts?

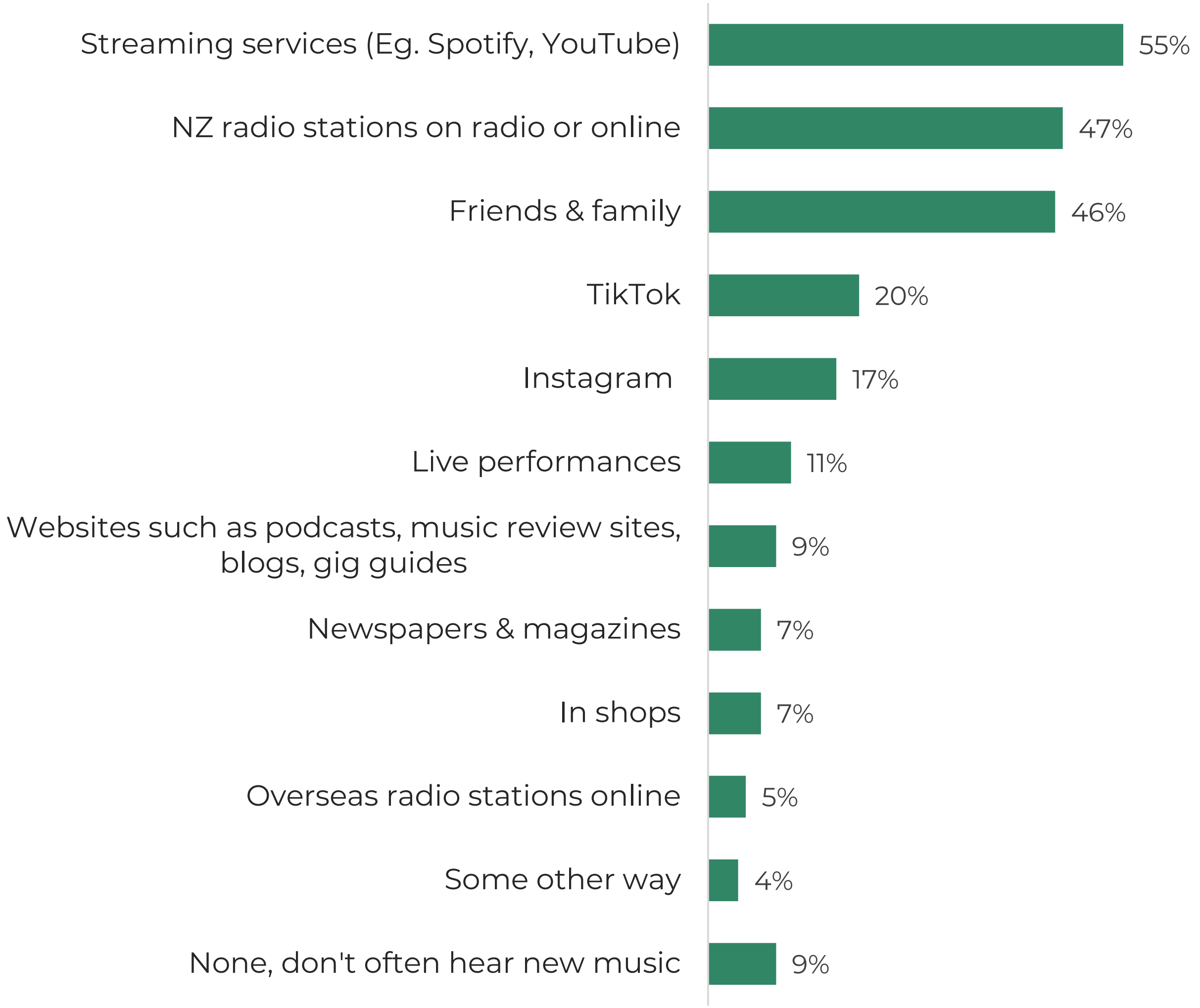
06

MUSIC CONSUMPTION AND BEHAVIOUR

Source of awareness of new music - 2023

- All New Zealanders 15+

There are three main sources of new music among New Zealanders – streaming services, NZ radio and word of mouth. Approximately one in two use these sources. TikTok and Instagram are next most widely used but by significantly fewer New Zealanders.



- Streaming services are more likely to be used as a source of new music by 15-34 year olds (72%) and especially by 15-24 year olds (76%).
- Females (51%) are more likely to find new music on the radio, as are 40-59 year olds (53%).
- Females (51%) and 15-24 year olds (57%) are more likely to use word of mouth through friends and family as a source of new music, as well as an older age group of 45-59 year olds (53%).

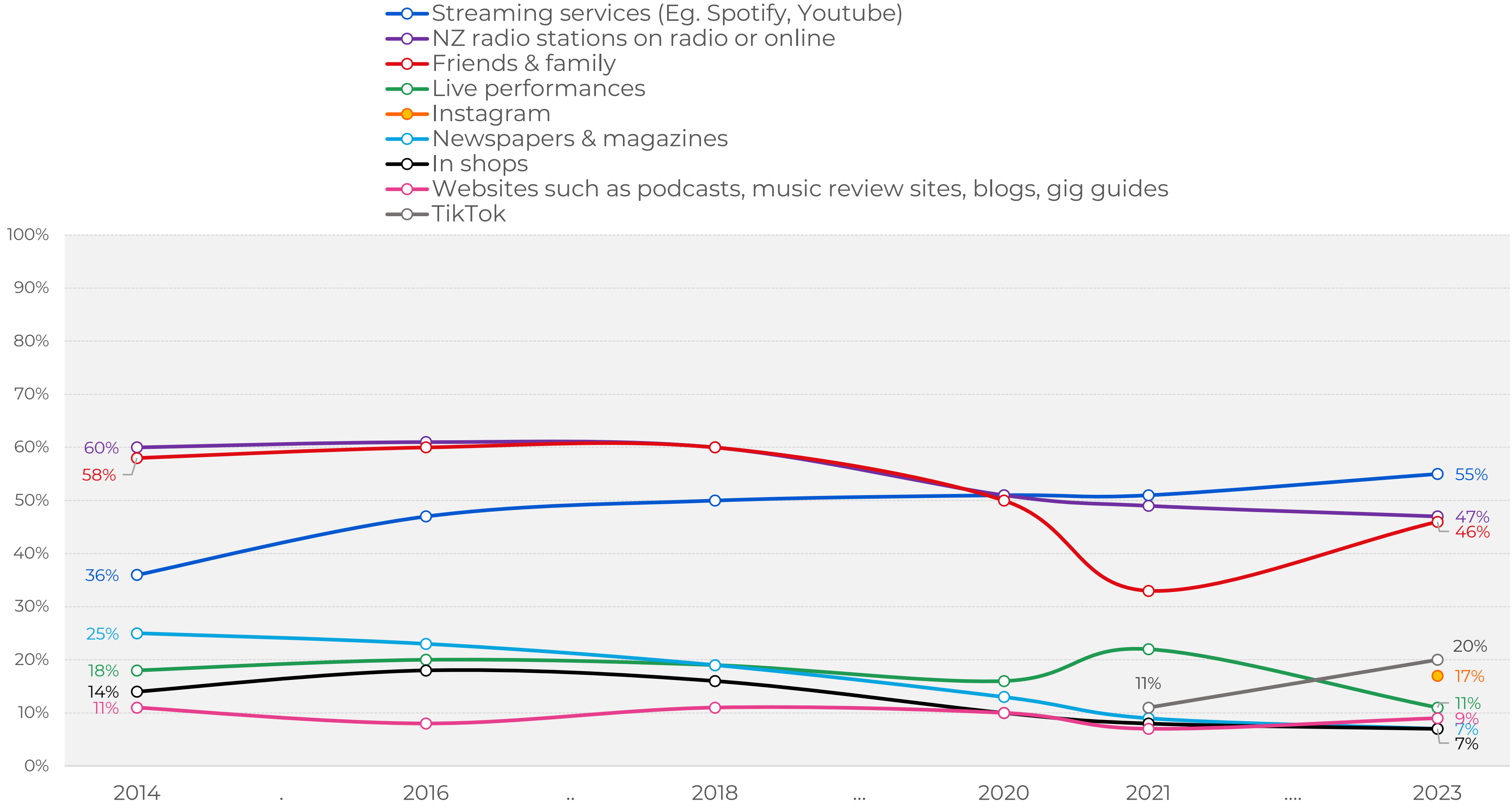
Base: All New Zealanders 15+:
(2023 n=1,408)

Q: In which of the following ways, if any, do you usually find out about new music?

Sources of awareness of new music over time

- All New Zealanders 15+
- Sources used by 5% or more

The influence of streaming services on music discovery continues to slowly grow, with TikTok also significantly increasing its influence since 2021. The role of radio is slowly diminishing over time, while the role of friends and family has increased after a significant drop in 2021 perhaps due to the effect of lockdown on word of mouth.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,053; 2021 n=1,420, 2023 n=1,408)

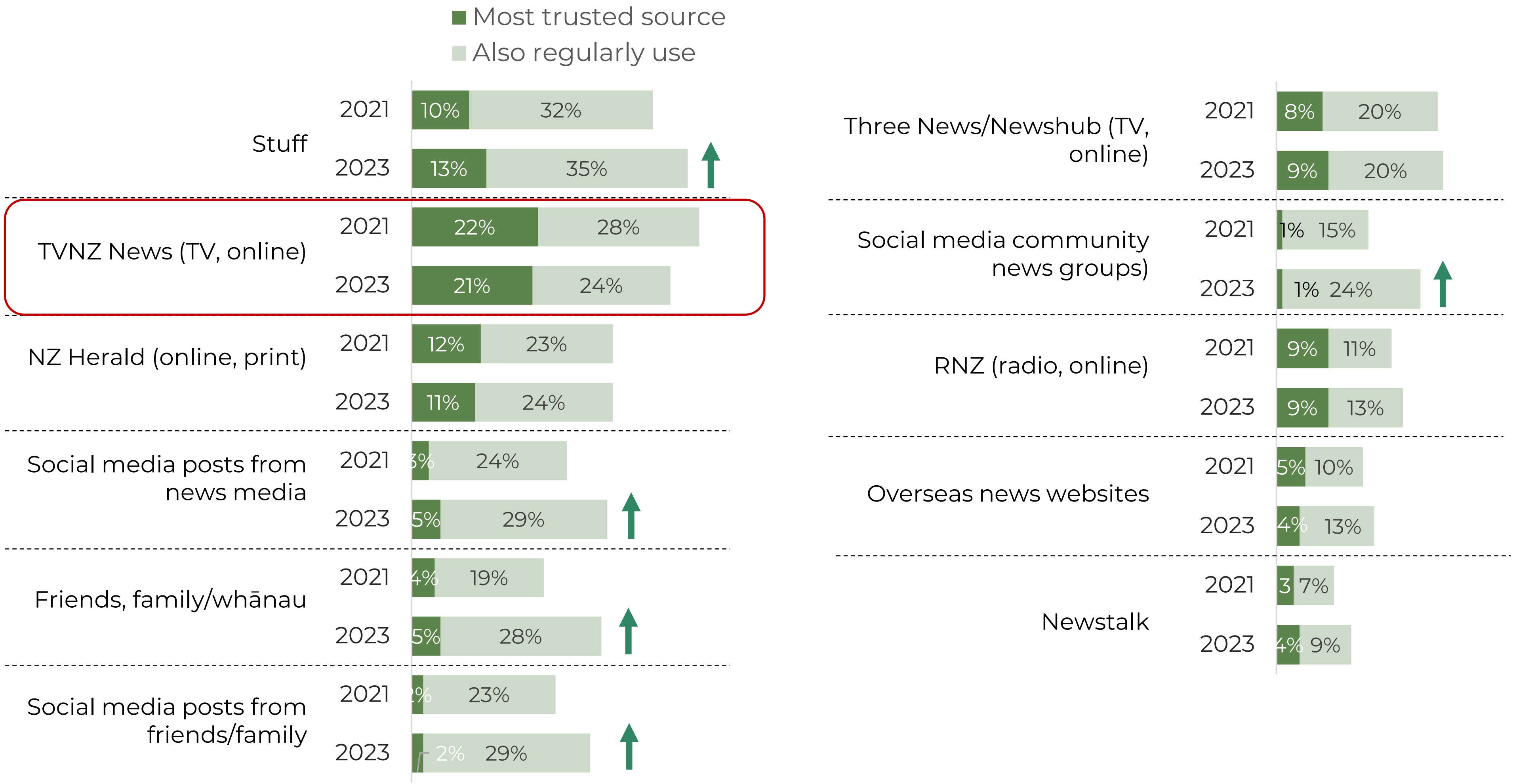
Q: In which of the following ways, if any, do you usually find out about new music?\

10 SOURCES OF NEWS & INFORMATION

Sources of news & information

- All New Zealanders 15+

Since 2021 Stuff has become a slightly more widely used source of news and information than TVNZ, but TVNZ remains the most trusted source by a significant margin. Social media of all types, and friends and whanau have also become more widely used since 2021, but few New Zealanders see them as their most trusted source.



Base: All respondents: (2021 n=1,420; 2023 n=1,408).

Q: Which of the following sources of news and information do you regularly use to keep up to date? And of these, which is your most trusted source of news?

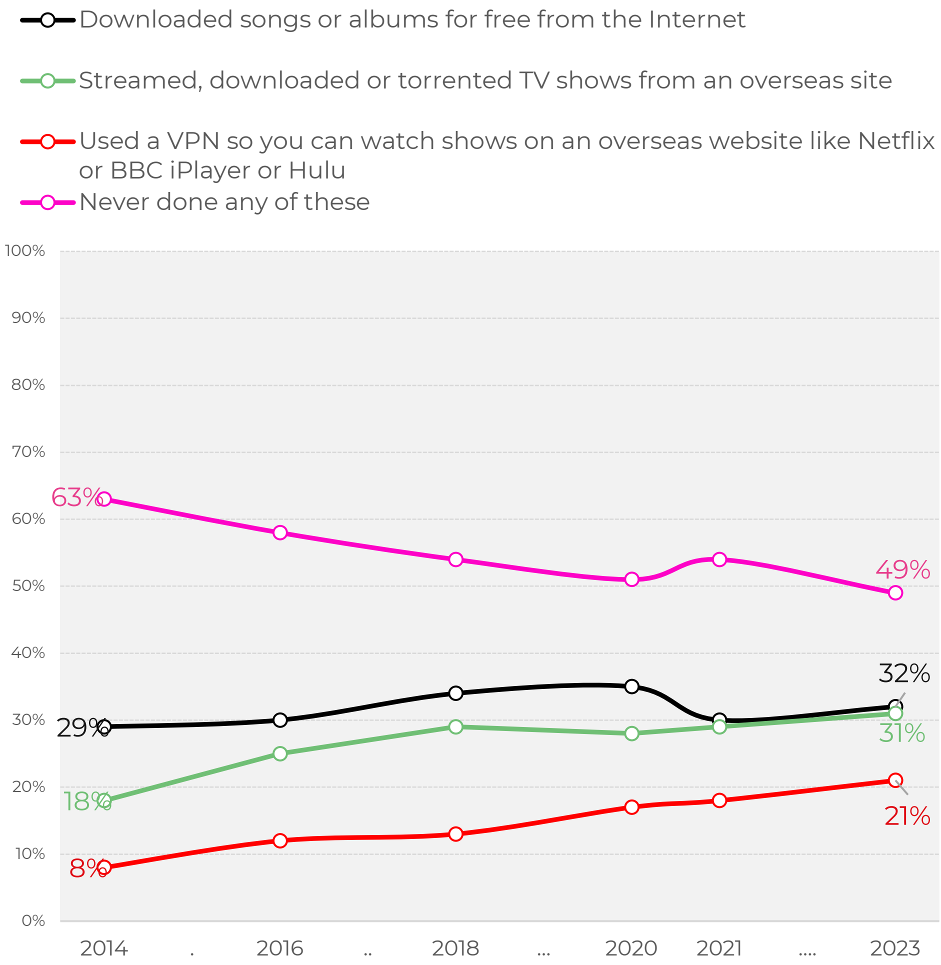
07 STREAMING, DOWNLOADING AND TORRENTING

Use of unauthorised platforms

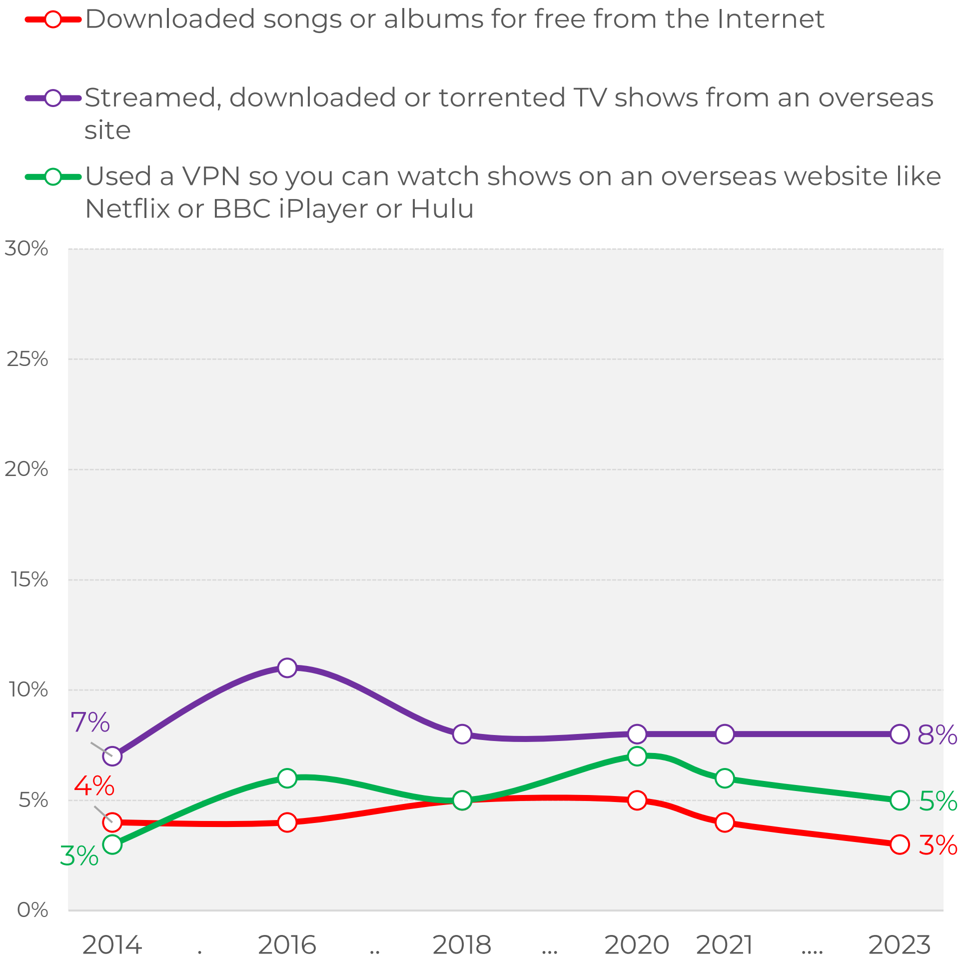
- All New Zealanders 15+

While there has been no significant change in the proportion of New Zealanders who have ever done these activities since 2021, incidence is gradually increasing over time. However frequency is not growing and in fact the weekly reach of using a VPN or illegally streaming/downloading TV shows is declining

EVER USED – All New Zealanders



WEEKLY REACH - All New Zealanders



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,053; 2021 n=1,420, 2023 n=1,408)

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q. Which of the following have you ever done?

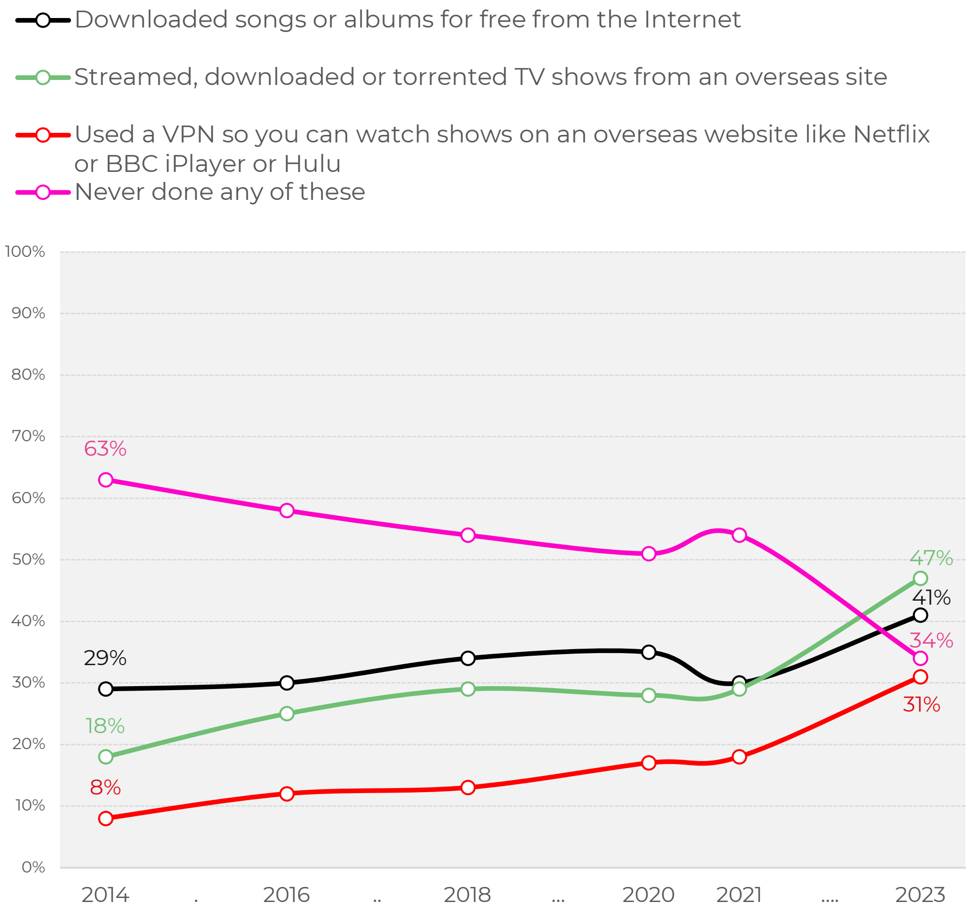
Q. About how often would you … ?

Use of unauthorised platforms

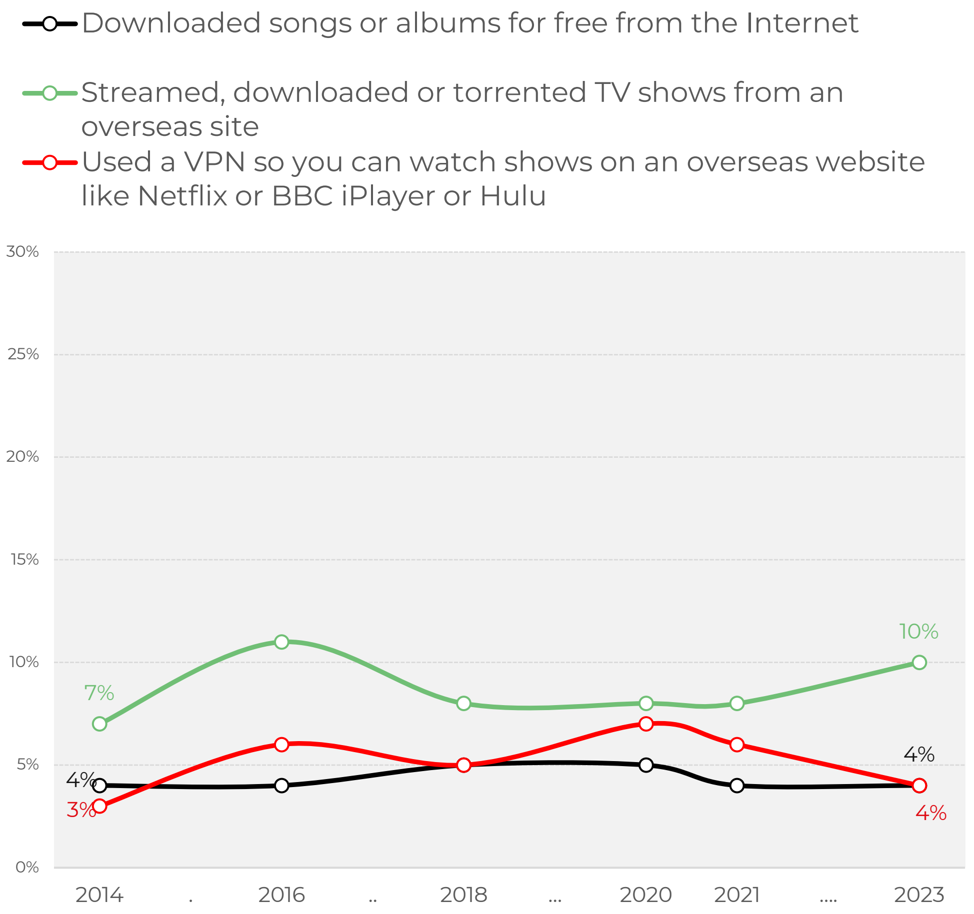
- All 15-34 year olds

While frequency (based on weekly reach) of using unauthorised platforms has not increased, the incidence of 15-34s trying each activity at least once has increased since 2021. Just one in three 15-34s have now never done any of these activities.

EVER USED - 15-34 year olds



WEEKLY REACH - 15-34 year olds



Base: All 15-34 year olds (2023: n=468)

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q. Which of the following have you ever done?

08

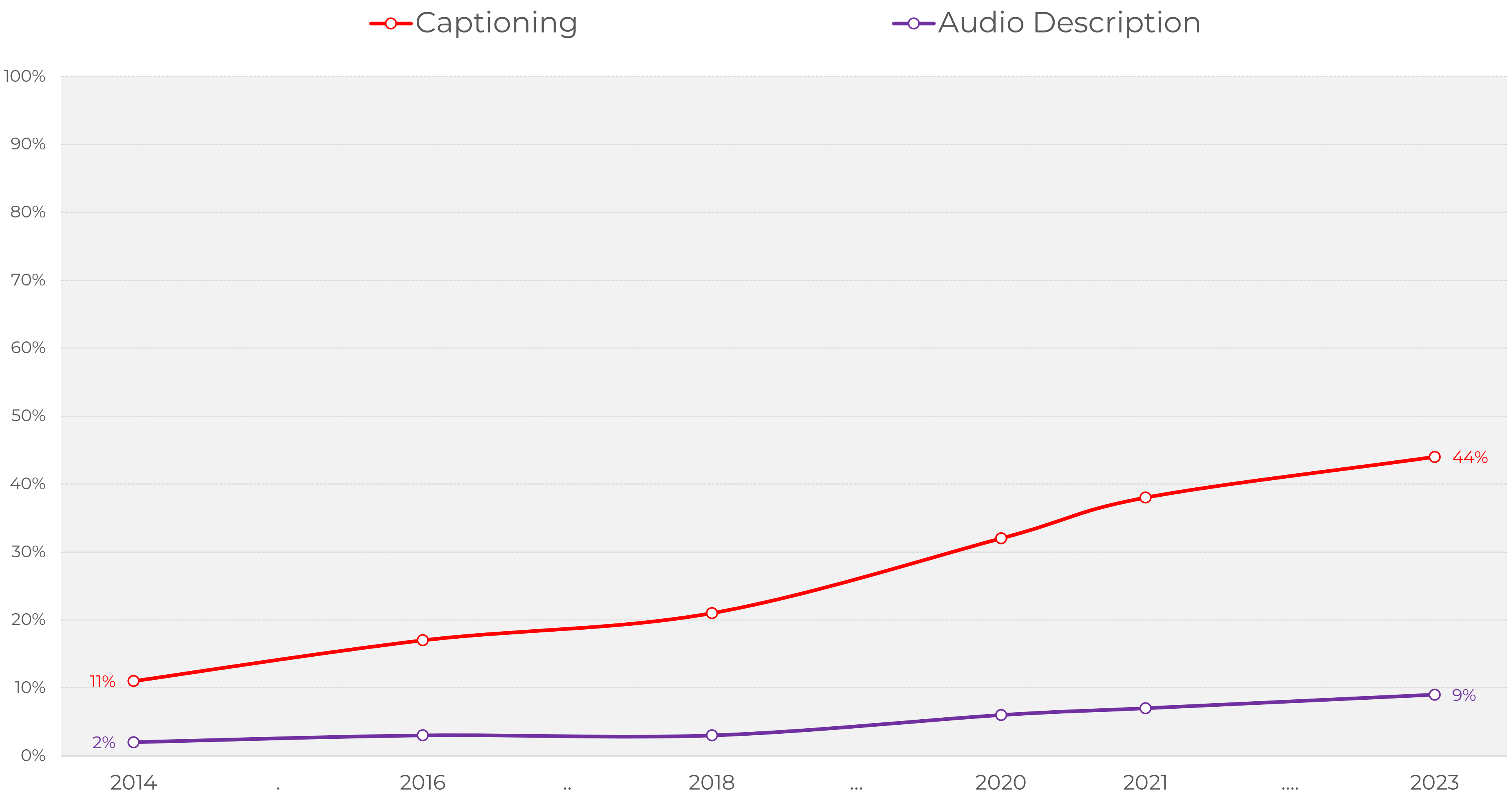
CAPTIONING AND AUDIO DESCRIPTION

Ever use captioning or audio description while watching TV

- All New Zealanders 15+

The proportion who use captioning while watching TV continues to increase – now up to more than four in ten New Zealanders – despite TV audiences declining over time.

Nearly one in ten use audio description.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q: Do you ever use audio description while you are watching TV? By audio description we mean the voice-over service that describes what is happening visually on the TV. Do you ever use captioning while you are watching TV? By captioning we mean English subtitles so you can read what people are saying if you are having trouble hearing them.

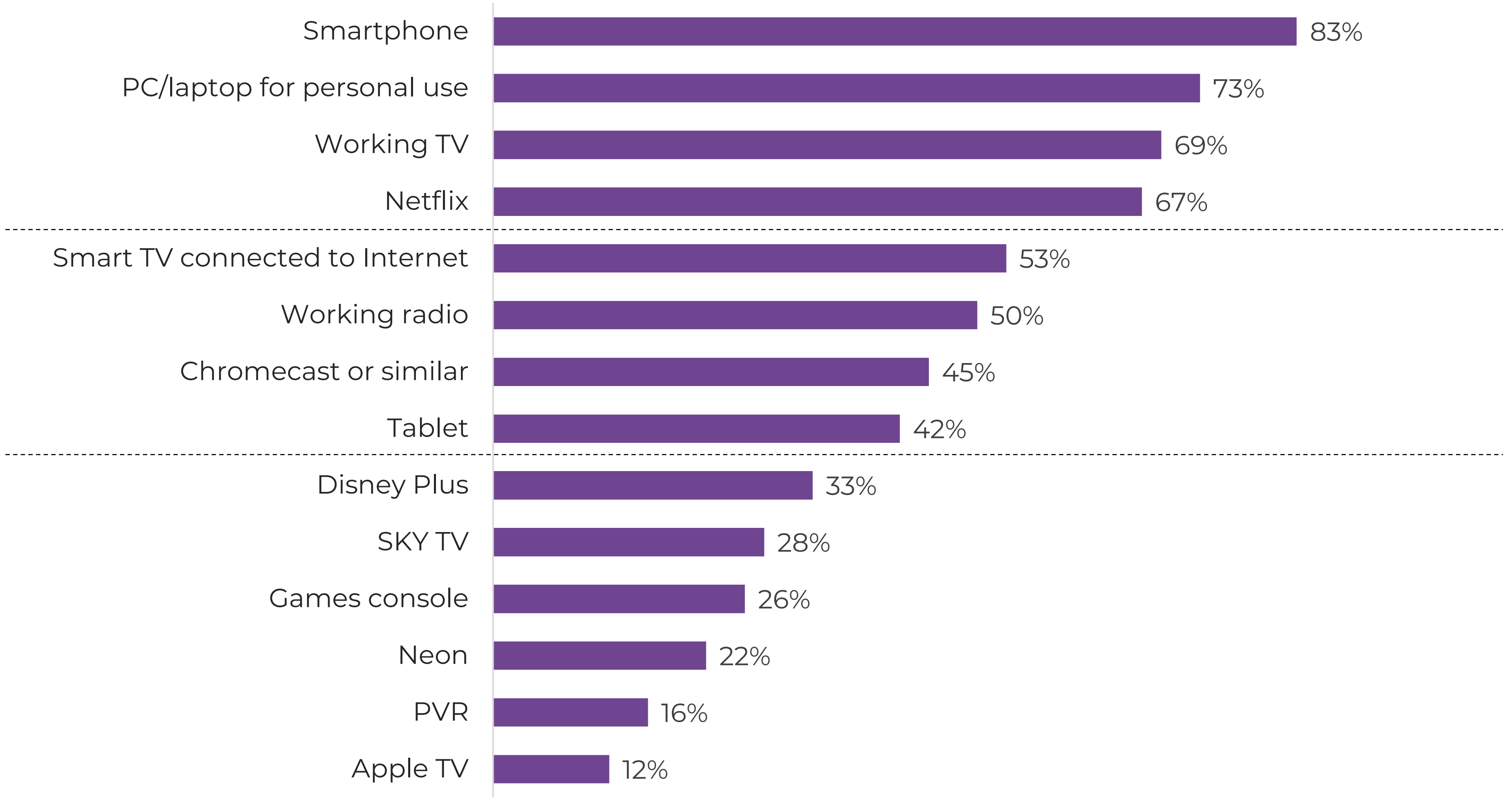
09 DEVICES OWN OR HAVE DAILY ACCESS TO

Devices & services personally own or have daily access to

- All New Zealanders 15+

Base: All respondents: 2023 n=1,408).

There are three tiers of incidence of devices and services. In the top tier more than eight in ten New Zealanders have a smartphone and three quarters have a PC/laptop, while seven in ten have a working TV and/or Netflix. In the second tier between four and five in ten have a smart TV connected to the internet, radio, Chromecast or tablet.

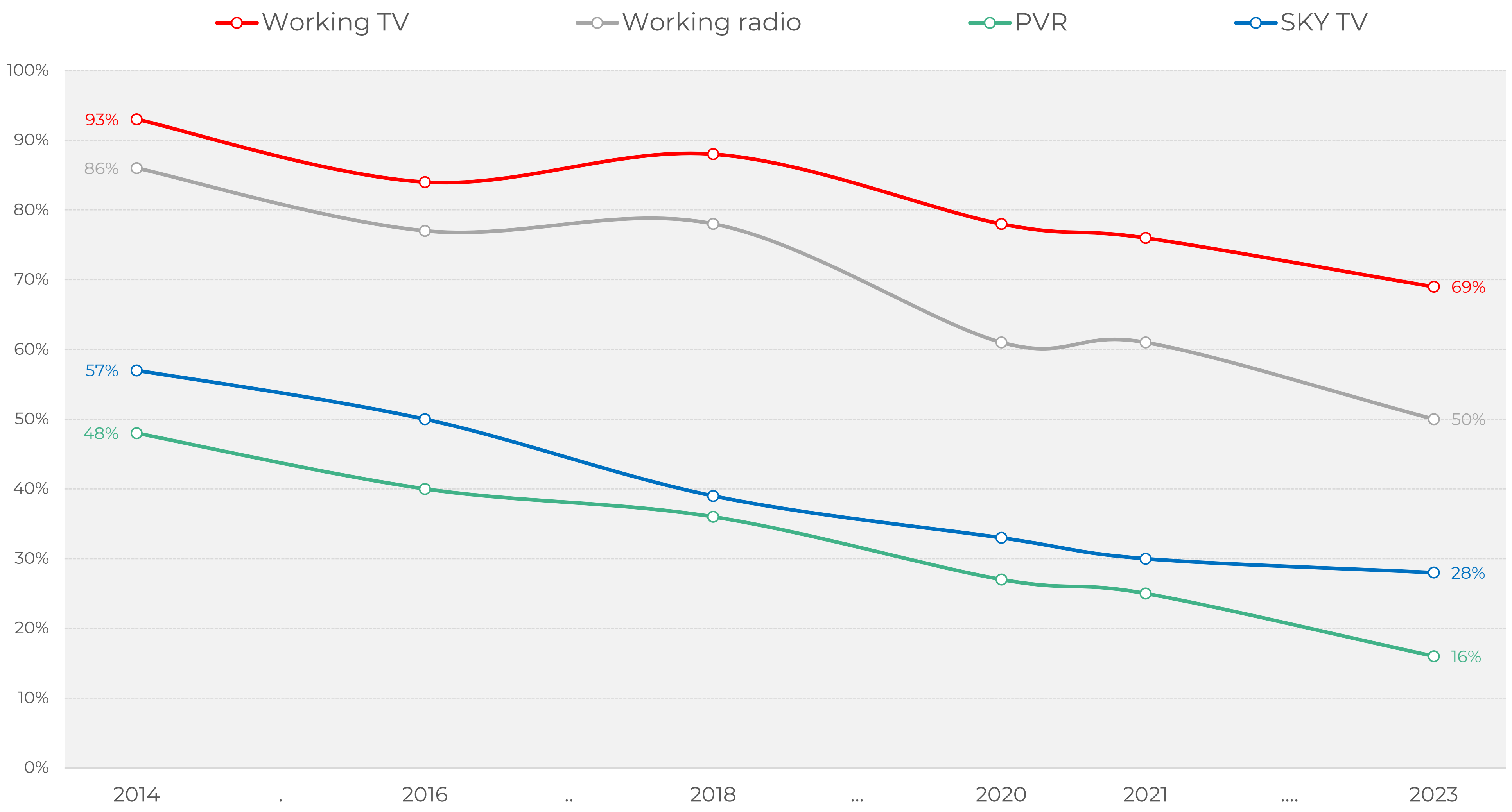


Q: Which of the following, if any, do you personally own or have daily access to?

Devices & services personally own or have daily access to over time

- **Traditional media**
- All New Zealanders 15+

The incidence of all devices and services that enable access to traditional media continue to decrease. Seven in ten have a working TV, one in two have a radio, and nearly three in ten have access to SKY TV.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

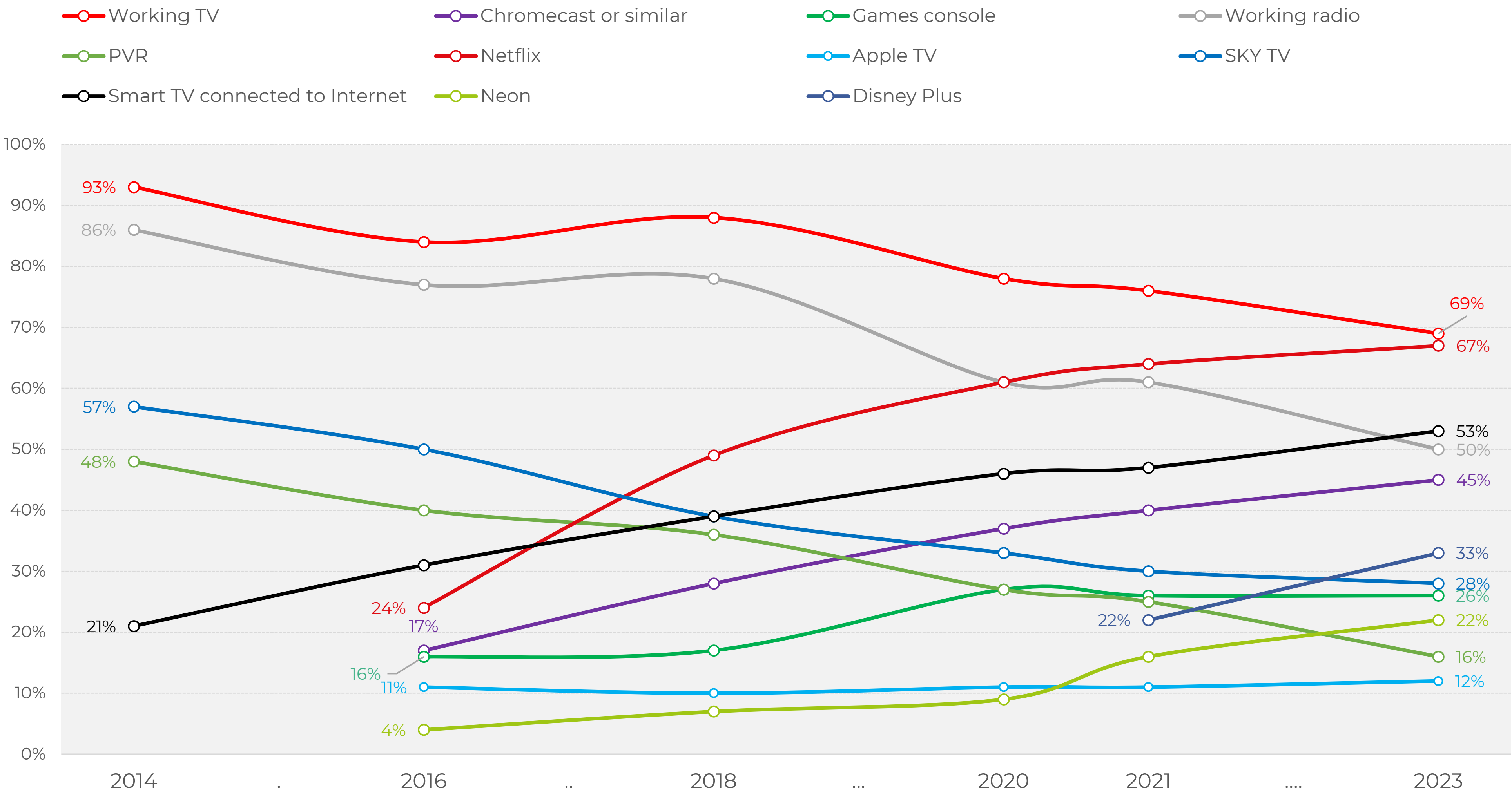
Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q: Which of the following, if any, do you personally own or have daily access to?

Devices & services personally own or have daily access to over time

- **All devices and services**
- All New Zealanders 15+

Conversely the incidence of devices and services that enable access to digital media continues to grow. Netflix is now almost as common as a TV. A smart TV connected to the internet and Chromecast are as common as a radio. However it is Disney Plus which shows the fastest rate of growth since 2021 with one in three now with access to this SVOD service.



Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420; 2023 n=1,408).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Q: Which of the following, if any, do you personally own or have daily access to?

Devices & services personally own or have daily access to – by generations

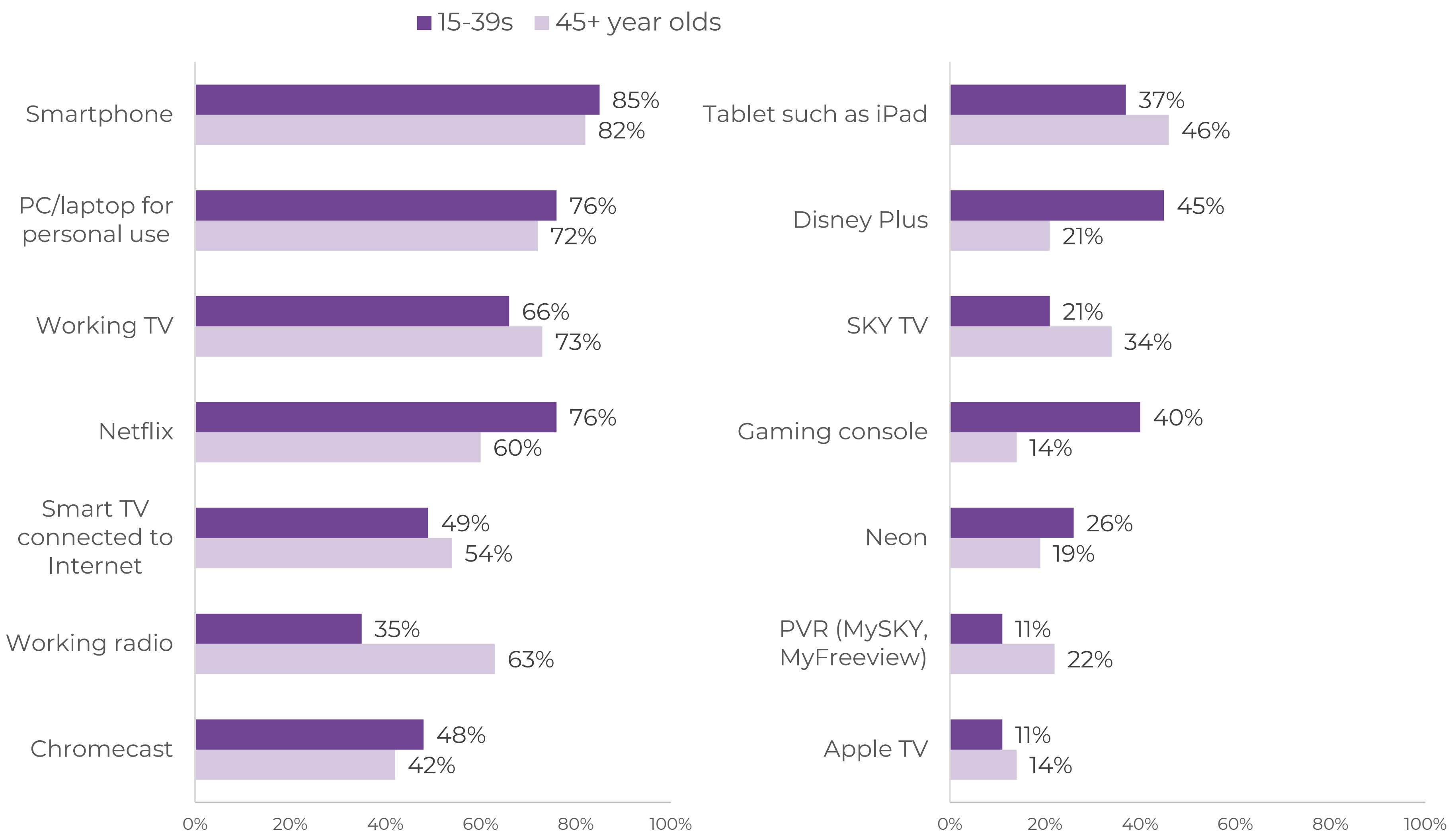
- All 15-39 year olds
- All 45+ year olds

Base: All 15-39s (n=579), all 45+ year olds (n=698)

Note: 40-44s have been deliberately excluded from this chart to better illustrate the generation gap as this age group typically demonstrate a transition between digital and traditional media.

Ranked in order of incidence among all New Zealanders.

Younger New Zealanders are more likely to use or have access to Netflix, Disney Plus or gaming consoles, whereas older New Zealanders are more likely to access a radio, SKY TV or a PVR.



Q: Which of the following, if any, do you personally own or have daily access to?

11 APPENDIX

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Online Video 68% daily reach overall	• 50+ year olds (50%) – esp. 65+ year olds (44%) – empty nesters (50%) – retiree (43%) – 1-2 person homes (59%)	• 15-39 year olds (88%) – students (84%) – flatting (86%) • Young singles/couples, no kids (83%) • Pre-school families (90%) • 4+ person homes (78%) • Māori (79%) • Asian (83%)
SVOD 57% daily reach overall	• 55+ year olds (40%) – esp 65+ (30%) – retirees (29%) – empty nesters (43%) – 1-2 person homes (49%) • Higher income earners ($80k+ - 62%)	• 15-39 year olds (67%) – flatting (65%) • Young singles or couples, no kids (66%) • Pre-school families (76%) • 5+ person homes (70%) • Lower income earners (up to $50k – 47%) • Pasifika (69%)

Irirangi Te Motu NZ On Air Glasshouse

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Linear TV 50% daily reach overall	• 15-44 year olds (29%) – students (28%) – flatting (16%) • Young singles/couple, no kids (26%) • 4+ person homes (38%) • Asian (29%) • Aucklanders (44%) • Games console in home (40%) • Disney Plus in home (42%)	• 45+ year olds (70%) – esp 60+ (75%) – retirees (78%) – empty nesters (70%) • 1-2 person homes (60%) • Sky TV homes (74%) • PVR homes (77%)
On demand 35% daily reach overall	• 15-29s (24% – students (24%) – flatting (20%) • Young singles/couple, no kids (28%) • Asian (25%) • Pasifika (29%)	• 45-59 year olds (43%) • Pre-school families (45%) • Mid-high income earners ($50-$150k = 39%) • Māori (42%)

This is a very different profile to 2021 – the on demand audience has broadened.

Irirangi Te Motu NZ On Air

Glasshouse

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Radio 39% daily reach overall	• 15-39 year olds (28%) – students (19%) – flatting (17%) • Young singles or couples, no kids (23%) • Home-makers (33%) • 5+ person homes (31%) • Asian (27%) • Pasifika (29%) • Games console in home (32%)	• 55+ year olds (51%) – empty nesters and older singles (49%) – retirees (46%) • Upper white collar workers (44%) • SKY TV homes (46%) • PVR homes (51%)
Online NZ Radio 15% daily reach overall	• Students (6%) • Flatting (9%) • 5+ person homes (10%) • Lower income earners (up to $50,000 – 9%) • Pasifika (6%)	• Males (18%) • 45+ year olds (19%) • Empty nesters (20%) • 1-2 person homes (20%) • Upper white collar workers (13%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Music Streaming 50% daily reach overall	• Females (47%) • 50+ year olds (30%) – 60+ year olds (25%) – retirees (22%) – empty nesters (29%) – 1-2 person homes (41%) • Lower income earners ($20-$50,000 – 37%)	• Males (54%) • 15-34 year olds (75%) – esp. 15-24s (78%) – students (76%) – flatting (72%) • Young singles and couples, no kids (70%) • Asian (63%) • Pasifika (63%) • Smart TV connected to internet (56%) • SVOD homes (55%) • Games console in home (65%)
Music on CDs/iPod/vinyl 11% daily reach overall	• Females (8%) • Retirees (7%)	• Males (14%)

Irirangi Te Motu NZ On Air Glasshouse

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Podcasts 17% daily reach overall	• Females (14%) • 55+ year olds (10%) • Retirees (9%) • Empty nesters (12%)	• Males (21%) • 15-34 year olds (22%) – flatting (23%) • Young singles/couples, no kids (23%) • Pre-school families (28%) • Upper white collar workers (23%) • Aucklanders (21%)
Online gaming 28% daily reach overall	• 55+ year olds (21%) – retirees (24%) – empty nesters (22%)	• 15-24 year olds (40%) – students (46%) – 5+ person homes (36%) • Young singles/couples, no kids (31%) • Low income earners (up to $20k = 42%)

Daily profile of audiences on key content providers

TVNZ 1: % OVERALL: 34

LESS LIKELY TO WATCH

- 15-44s (15%)
  - students (12%)
  - flatting (7%)
- Young singles/couples, no kids (15%)
- Pre-school families (18%)
- Blue collar workers (26%)
- Asian (25%)
- Pasifika (27%)
- Games console in home (23%)

MORE LIKELY TO WATCH

- 55+ year olds (60%)
  - retirees (67%)
  - empty nesters and older singles (55%)
  - 1-2 person homes (45%)
- Mid-income earners ($20-$50k = 43%)
- Radio in home (42%)
- SKY TV homes (44%)
- PVR homes (50%)

THREE: % OVERALL: 17

LESS LIKELY TO WATCH

- 15-44s (8%)
  - students (5%)
  - flatting (3%)
- Young singles/couples, no kids (7%)
- Pre-school families (8%)
- 4+ person homes (10%)
- Asian (8%)

MORE LIKELY TO WATCH

- 55+ year olds (29%)
  - retirees (32%)
  - empty nesters (28%)
  - 1-2 person homes (23%)
- SKY TV homes (26%)
- PVR homes (24%)

TVNZ 2: % OVERALL: 11

LESS LIKELY TO WATCH

- Student (5%)
- Flatting (6%)
- Asian (7%)

MORE LIKELY TO WATCH

- Females (13%)
- Home-maker (17%)
- Māori (20%)

SKY SPORTS CHANNELS: % OVERALL: 8

LESS LIKELY TO WATCH

- Females (5%)
- 15-39s (5%)
  - students (5%)
  - flatting (3%)
- Young singles/couples, no kids (3%)
- Home-makers (1%)
- Unemployed (0%)
- Low income earners (up to $30,000 = 4%)
- Asian (3%)

MORE LIKELY TO WATCH

- Males (13%)
- 55+ year olds (13%)
  - retirees (12%)
  - empty nesters (12%)
- Pasifika (11%)

Irirangi Te Motu NZ On Air Glasshouse

Daily profile of audiences on key content providers

NETFLIX: % OVERALL: 42

LESS LIKELY TO WATCH

- 60+ year olds (25%)
  - retirees (22%)
  - older singles/couples, no kids (32%)
  - 1-2 person homes (34%)
- Lower income earners (up to $50,000 = 31%)

MORE LIKELY TO WATCH

- 15-39 year olds (51%)
- Families (47%)
  - 4+ person homes (51%)
- High income earners ($150k+ - 49%)
- Pasifika (55%)
- Smart TV connected to Internet (49%)
- Chromecast homes (49%)
- Game console in home (54%)
- Neon homes (57%)
- Disney Plus homes (55%)

YOUTUBE – FOR VIDEO: % OVERALL: 44

LESS LIKELY TO WATCH

- Females (35%)
- 60+ year olds (32%)
  - retirees (27%)
  - older singles/couple, no kids (35%)
- Home-maker (35%)
- Pakeha (39%)
- SKY TV homes (38%)

MORE LIKELY TO WATCH

- Males (53%)
- 15-34 year olds (60%)
  - students (58%)
  - flatting (58%)
  - young singles/couples, no kids (57%)
- Pre-school families (53%)
- Blue collar workers (51%)
- Māori (50%)
- Asian (65%)
- Aucklanders (48%)
- Games console (53%)

SPOTIFY: % OVERALL: 33

LESS LIKELY TO WATCH

- 55+ year olds (14%)
  - esp. 65+ year olds (6%)
  - retirees (8%)
  - empty nesters (14%)
  - 1-2 person homes (24%)
- Lower income earners ($20-$50,000 – 22%)

MORE LIKELY TO WATCH

- 15-34 year olds (58%)
  - students (59%)
  - flatting (62%)
- Young singles/couples, no kids (53%)
- Pre-school families (52%)
- 3+ person homes (42%)
- Lowest income earners (up to $20,000 – 42%)
- Asian (41%)
- Chromecast homes (39%)
- SVOD homes (39%)
- Games console in home (45%)

TVNZ OnDemand % OVERALL: 27

LESS LIKELY TO WATCH

- 15-29 year olds (17%)
  - students (12%)
  - Flatting (14%)
- Asian (15%)

MORE LIKELY TO WATCH

- 45-59s (34%)
- Lower white collar workers (33%)
- Pre-school families (37%)
- Māori (33%)

Irirangi Te Motu NZ On Air Glasshouse

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
Working TV 69% overall	• 15-24 year olds (63%) – Flatting (50%) • Young singles/couples, no kids (58%) • Asian (45%) • Pasifika (60%)	• 45+ year olds (73%) • Home-makers (80%) • Families (75%) • Highest income earners ($120,000+ - 74%) • Māori (79%) • Working radio (90%) • SKY TV (80%) • PVR (91%) • Chromecast in home (81%) • Games console (85%)
Radio 50% overall	• 15-44 year olds (37%) – students (31%) – flatting (27%) • Single & double income couples, no kids (30%) • 5+ person homes (42%) • Asian (30%) • Pasifika (42%) • Aucklanders (43%)	• 50+ year olds (64%) – retirees (70%) – empty nesters (61%) • Working TV (53%) • SKY TV (65%) • PVR (74%) • Chromecast (60%)
SKY TV 28% overall	• 15-39 year olds (21%) – flatting (8%) • Single & double income young couples, no kids (16%) • Home-makers (18%) • Low income earners (up to $30,000 – 19%) • Asian (16%)	• 50+ year olds (35%) – empty nesters (36%) – retirees (33%) • Families with kids 15+ (36%) • Upper white collar workers (32%) • Higher income earners ($120k+ = 34%) • Māori (34%) & Pasifika (37%) • PVR (71%) • Smart TV connected to the internet (34%) • Chromecast (33%)

Irirangi Te Motu NZ On Air Glasshouse

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
PVR 16%	• 15-34 year olds (10%) – students (10%) – flatting (3%) • Young singles & couples, no kids (6%) • Asian (7%)	• 45+ year olds (22%) • Families with kids aged 15+ (25%) • Upper white collar workers (21%) • High income earners ($120k+ = 23%) • Māori (23%) • Pasifika (25%) • SKY TV (41%) • Smart TV connected to Internet (21%)
Smart TV connected to internet 53% overall	• 65+ year olds (46%) – retirees (47%) – older singles (43%) – single person homes (42%) • 15-24 year olds (43%) – students (38%) – flatting (28%) • Low income earners (up to $50k = 40%)	• 40-54 year olds (61%) • Home-makers (65%) • Families (61%) • High income earners ($120k+ = 68%) • SKY TV (63%) • PVR (69%) • SVOD Home (63%) • Chromecast (64%) • Games console (70%)
Chromecast 45% overall	• 65+ year olds (33%) – retirees (30%) – empty nesters (37%) – 1-2 person homes (38%)l • Lower income earners (up to $30,000 – 30%)	• 35-44 year olds (50%) • 4+ person homes (52%) • Families (51%) • High income earners ($80k+ = 52%) • Māori (53%) • Pasifika (54%) • PVR (57%) • SVOD home (54%) • Smart TV connected to Internet (55%) • Games console (60%)

Irirangi Te Motu NZ On Air Glasshouse

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
Games console 26% overall	• 55+ year olds (5%) – 60+ year olds (3%) – retirees (1%) – empty nesters (6%) – 1-2 person homes (16%) • Lower income earners ($20-$80,000 = 16%)	• 15-39 year olds (39%) – students (37%) • Families (38%) • 4+ person homes (38%) • Blue collar workers (36%) • Highest income earners ($80,000+ = 34%) • Lowest income earners (up to $20,000 = 34%) • Māori (38%) • Pasifika (38%) • Working TV (32%) • Smart TV connected to Internet (35%) • Chromecast (35%)

Irirangi Te Motu NZ On Air Glasshouse

WHERE ARE THE AUDIENCES? 2023

SEPTEMBER 2023