WHERE ARE THE AUDIENCES?

2016



Glasshouse

NZ On Air
Irirangi Te Motu

Introduction

- NZ On Air is New Zealand's broadcast and online content funding agency. Its remit is **to support local content and provide audiences with diversity and choice to ensure New Zealand media reflects a wide range of different perspectives.**
- It is therefore vital NZ On Air have an accurate understanding of audience behaviour and trends in terms of the media New Zealanders use.
- In 2014 NZ On Air commissioned the benchmark study Where Are The Audiences? This provided an accurate picture of New Zealand audience behaviour at that point in time.
- Since then media choice has continued to expand. Some changes in the media landscape since 2014 include:
  - The launch of NZ based SVOD services including Netflix, Lightbox and Neon.
  - Netflix internationally and broadcasters locally restricting the use of VPNs and "Global Mode" type offerings.
  - Investment by Facebook, news sites and others in greater video content.
  - Television audience declines and launch of new TV channels such as DUKE and Garage.
  - The launch of Apple Music and declining music CD sales.
  - Innovations such as Chromecast and FreeviewPlus.
- To understand how audience behaviour is changing, NZ On Air commissioned this 2016 study to update and monitor the measures established in the 2014 Where Are The Audiences? study.
- This 2016 study will inform NZ On Air's content funding strategies across different media platforms, and provide a public source of information for all stakeholders about audience behaviour in 2016 and how that is evolving over time.

Research Approach

- **The first priority in the design and conduct of the 2016 study was to ensure valid and robust comparisons could be made to the 2014 results. Therefore the overall approach, timing of the study, sampling and respondent definition, question flow and most wording, and post-weighting factors were kept consistent with the 2014 study.**
- This included asking respondents about their behaviour "yesterday" within specific time periods between 6am and midnight. This technique enables the creation 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.
- A total sample of n=1,404 was developed, with representative samples created for each day of the week (n=200 per day) so that results can be extrapolated to a "typical" day.
- The total sample has a maximum margin for error of +/-2.6%.

Research Approach

- As in 2014, a mixed methodology of telephone and online interviewing was used.
- N=1,001 interviews were completed by telephone using random digit dialling, and n=403 interviews were completed online using Consumer Link's Flybuys panel.
- The online interviews were conducted with consumers without access to a home landline.
  - The 2013 Census showed that 15% of people live in homes without a landline, however this incidence will have undoubtedly grown since 2013. Nielsen CMI data was used to estimate the 2016 incidence at 25%.
    - In 2013 Nielsen CMI estimated non-landline penetration at 25% (compared to 15% in the Census). In 2016 Nielsen estimates this incidence at 45%. This is clearly an over-estimate given the comparison of Nielsen's 2013 estimate and the 2013 Census result. We therefore factored the 2016 Nielsen CMI estimate down by a similar proportion as Nielsen were over-estimating the Census result in 2013.
- Interviewing was conducted between April 11 and May 22.
- Respondents were defined as all New Zealanders aged 15 and over.
- Regional sample stratification, and minimum quotas for males, 15-24 year olds and ethnicity were implemented.
- The total sample was post-weighted by the following factors to ensure it was representative of the 15+ NZ population;
  - access to a landline, gender, age, ethnicity.

Research Scope

- The study investigated the media consumed "yesterday", for how long, and which channels, stations and sites were used. These questions measured the daily behaviour of the main broadcast, print, online and music media. The bulk of this report examines daily audience behaviour.
- Respondents were also asked about their involvement with webseries, extra online material relating to a TV show, using captioning and audio description, and music sources and discovery.
- The study also captures the weekly reach of all media, including less frequently used media not covered by the daily measures so as to provide a single point of comparison of all media included in this study. The first chart in the Summary section examines this overall comparison of all media based on weekly reach.
- Two key aspects were not included in this study, or the 2014 study;
  - Device used to consume media. (Ownership and access to devices was collected.)
  - Simultaneous media consumption.
- Some changes were made to the survey since 2014 to reflect the changing media landscape. These included;
  - Measuring consumption of NZ and international SVOD services separately.
  - Capturing sites used for online video and music.
  - Measuring incidence of ever viewing webseries and source of that content.
- These results 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 a unique, single source comparison across media.

SUMMARY & CONCLUSIONS

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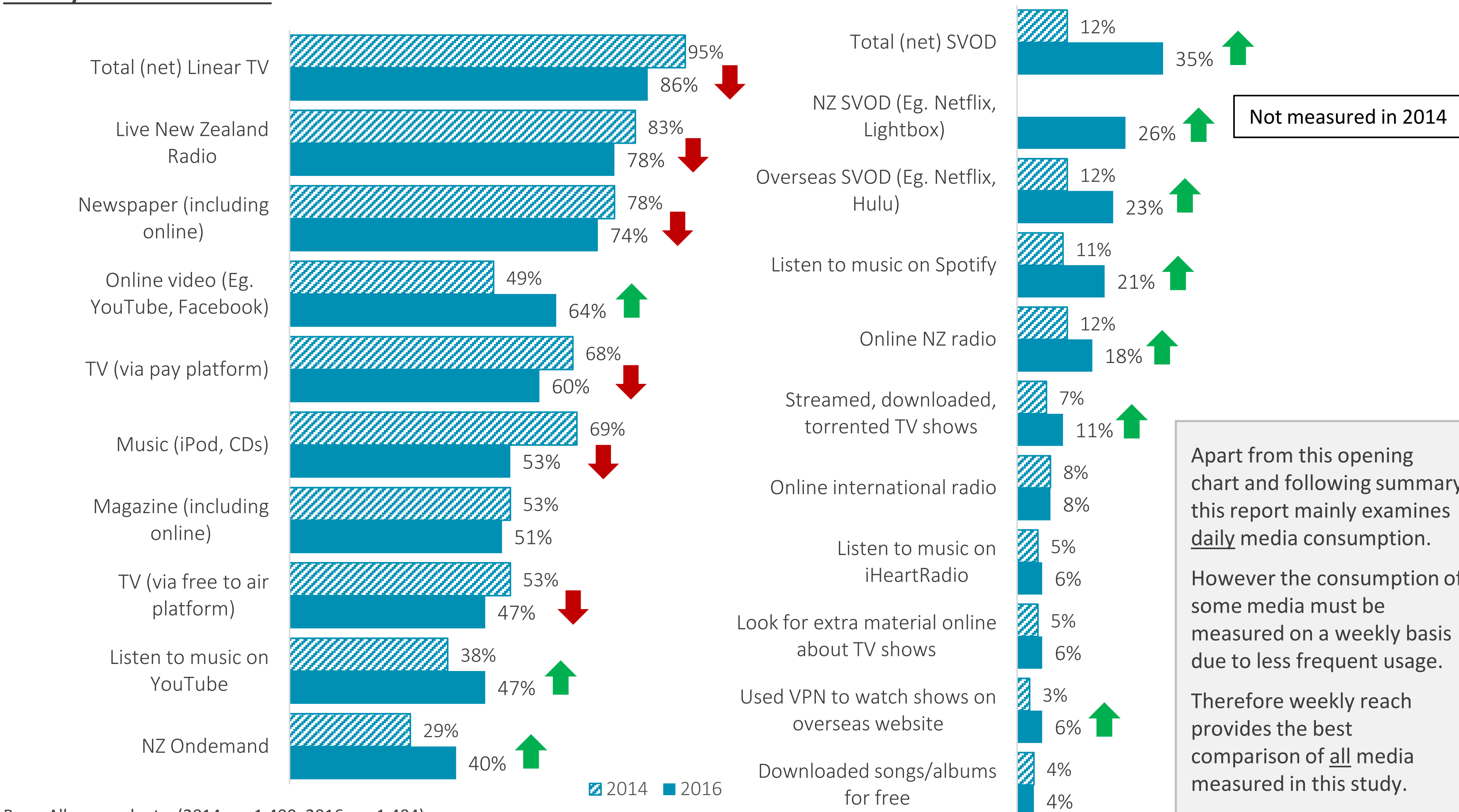
Traditional media continue to deliver the biggest audiences in New Zealand, however these audiences have declined since 2014 and nearly all online media and especially SVOD services have grown significantly.

Weekly reach of all media

% of all NZers



Apart from this opening chart and following summary this report mainly examines daily media consumption.

However the consumption of some media must be measured on a weekly basis due to less frequent usage.

Therefore weekly reach provides the best comparison of all media measured in this study.

Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q8: We'd like you now to think about what you do over a typical week. Please tell me about how many days per week you would usually do each of the following.

Indicates significant change at 95% c.i.

Traditional broadcast media still deliver the biggest audiences, but the gap to online media has closed significantly since 2014.

- The media landscape is changing rapidly and these results show that New Zealanders' media consumption is changing with it.
    - New Zealanders have expanded their media repertoires and increased their overall media consumption since 2014. This is demonstrated by the combined increased reach of various online media being greater than the declines in traditional media.
- Traditional media continues to deliver the biggest audiences in New Zealand – including niche and hard to find groups – but the dominance seen in 2014 has significantly diminished.
    - Linear TV continues to reach nearly nine in ten New Zealanders each week, and broadcast radio reaches nearly eight in ten.
    - The biggest online audiences are delivered by online video on sites such as YouTube and Facebook reaching more than six in ten New Zealanders each week.
- Nearly all forms of online media have grown significantly since 2014.
    - Online video via sites like YouTube and Facebook now reach more than six in ten New Zealanders each week.
    - Music via YouTube and Spotify reaches five in ten and two in ten New Zealanders respectively.
    - NZ Ondemand sites now reach four in ten New Zealanders each week.
    - Online NZ radio now reaches nearly two in ten New Zealanders.
- However the biggest growth and driver of change in media behaviour since 2014 is consumption of SVOD content since the New Zealand launch of Netflix, Lightbox, and Neon.
    - More than one in three New Zealanders now watch SVOD content on an overseas or NZ based site each week.

However growth in online media use is variable

- Less widely used online media such as online NZ and international radio, and use of unauthorised platforms have typically shown less growth since 2014.
- While NZ based SVOD services have grown, there has been less growth in usage of unauthorised platforms since 2014.
  - Streaming, downloading or torrenting TV shows from an overseas website has grown slightly, but still only delivers 11% weekly reach.
  - Just 6% use a VPN to watch shows on an overseas website each week.
- While there has been significant growth in listening to music on YouTube and Spotify, there has been less growth of unauthorised downloading of songs and albums from the internet (4% weekly reach), and of listening to overseas radio stations online (8%).

New Zealanders continue to tune in to traditional broadcast media more frequently than online options, but online video and music streaming are closing the gap.

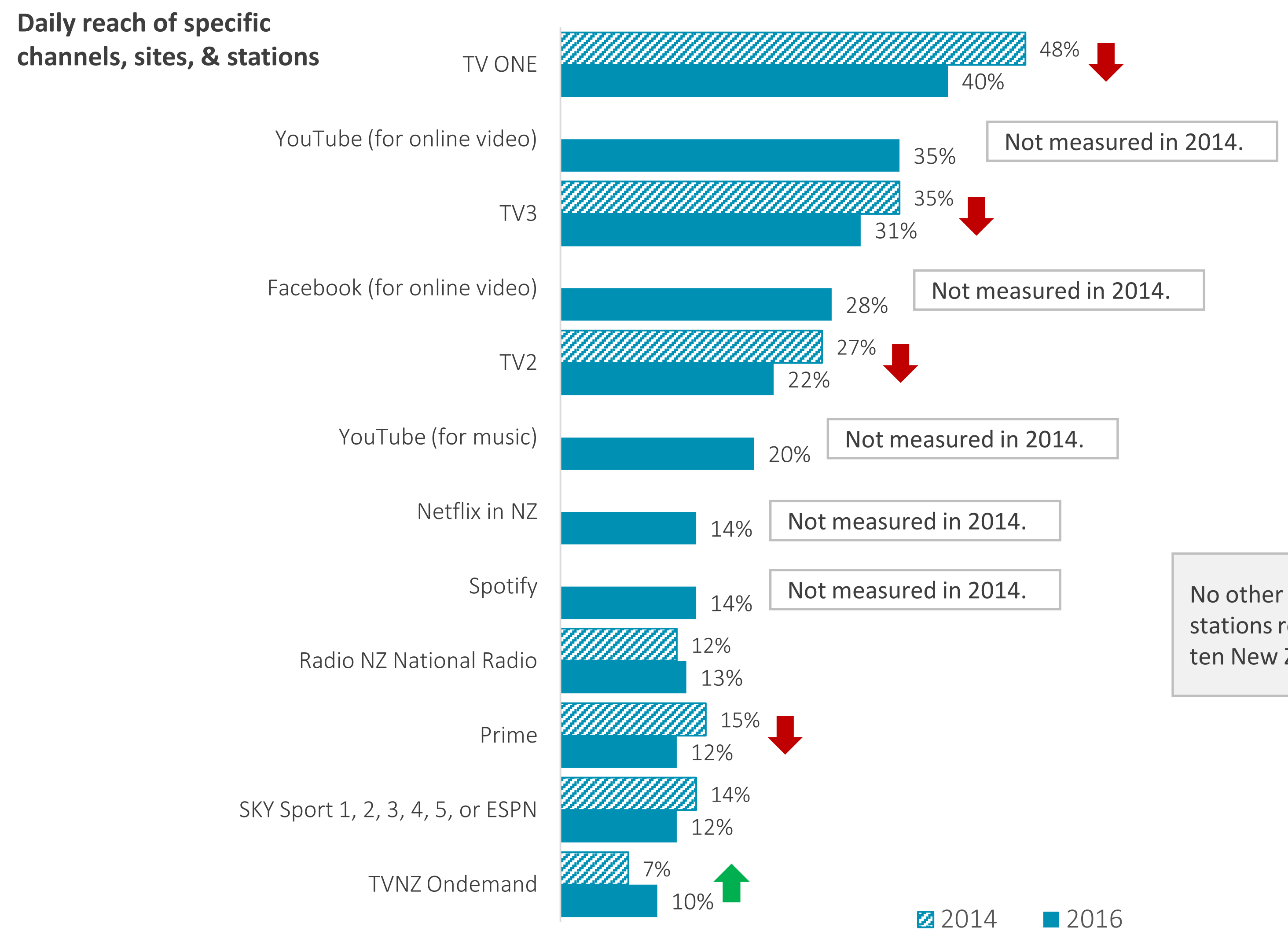
- Among those who tune in to each media in a typical week, broadcast radio listeners do so the most frequently (5.4 days a week on average).
- Watching TV on a pay TV platform matches this (5.4 days) with watching TV on a Free To Air platform on 4.8 days a week.
- Comparatively viewers of online video such as YouTube and Facebook watch this media on 4.4 days a week on average, and music streamers listen to this media 4.2 days a week.
- Viewers of NZ based SVOD services tune in to this media on 3.6 days a week on average.

New Zealanders continue to dedicate significantly more time to traditional broadcast media each day despite strong growth in time spent watching online video, SVOD & Ondemand.

- New Zealanders dedicate more than two and a half hours of their time to linear TV each day, and listen to more than an hour and a half of broadcast radio each day.
  - While time spent listening to the radio has declined slightly, time spent watching TV has not changed significantly since 2014.
  - Given the decline in daily audience reach for linear TV, unchanged time spent viewing suggests it is lighter TV viewers who have typically dropped out of daily audiences since 2014.
- Time spent watching online video via sites such as YouTube and Facebook has more than doubled since 2014, but is still low compared to broadcast media at 40 minutes per day.
- Similarly, time spent watching SVOD is 40 minutes per day in 2016 – however this has grown from just 6 minutes in 2014.

- The lengths of time quoted above are based on <u>all</u> New Zealanders, including those who do not engage in each media.
- Looking at <u>only</u> those who engage with each media does not change the above conclusions, as linear TV still attracts the most time (over three and a half hours among users), however SVOD shows its ability to deliver a very engaged audience with users of this media spending 3 hours each day watching this content.

The biggest daily audience concentrations on single channels, stations or sites are on TV ONE, YouTube, TV3, Facebook, and TV2.



No other single channels, sites or stations reach more than one in ten New Zealanders each day.

Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q1: Which of the following did you use yesterday?

Indicates significant change at 95% c.i.

There are several implications of the concentration of large audiences in relatively few places.

- Beyond the most popular TV channels and radio stations, there is significant fragmentation of audiences.
  - 22 TV channels capture 5% or less daily reach, and an additional 9% of New Zealanders watch some “other” channel/s.
  - 14 radio stations capture 5% or less daily reach, and an additional 12% of New Zealanders listen to some “other” station/s.

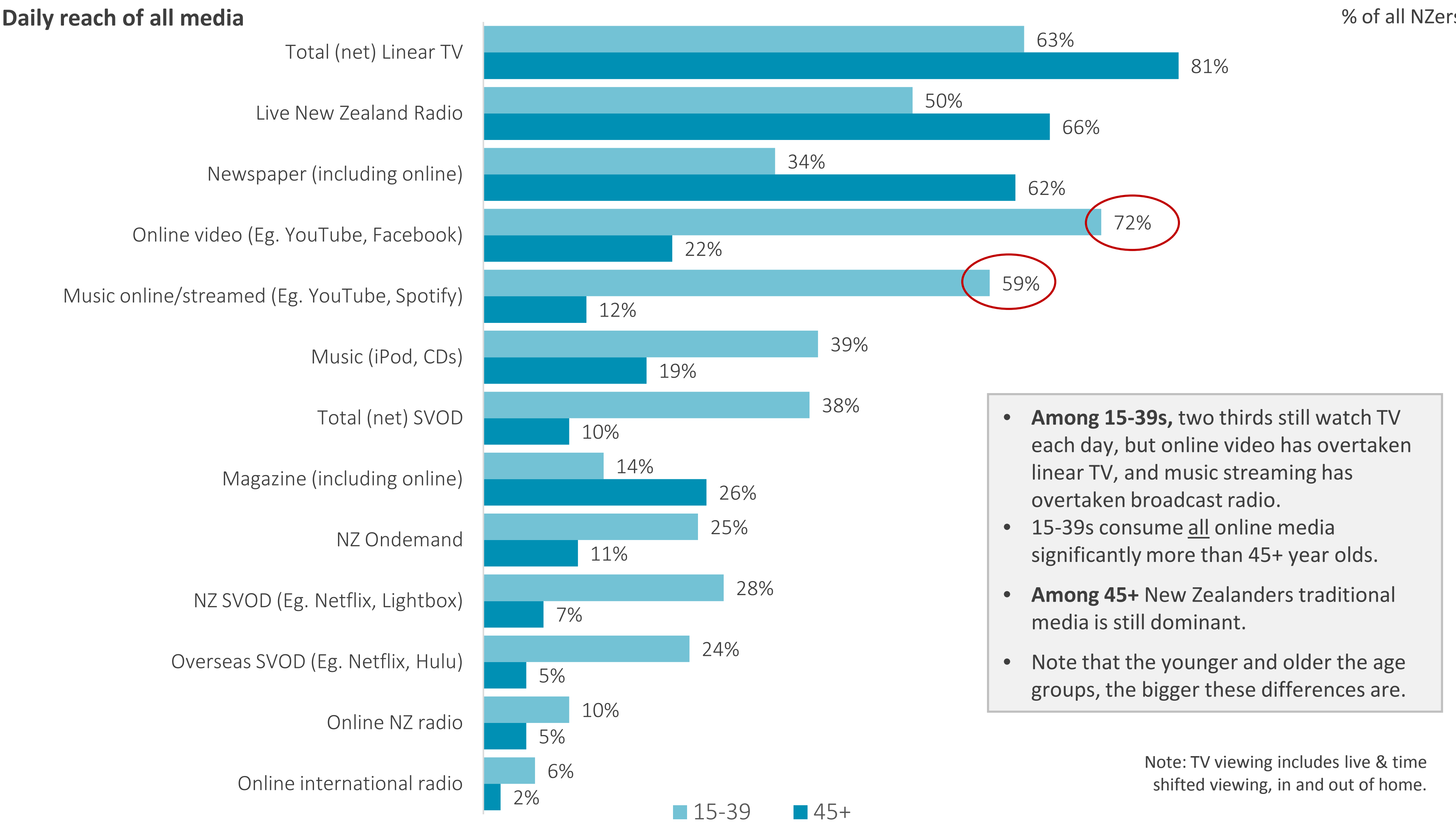
- Niche or hard to find audiences are most likely to be consuming the biggest channels, stations and sites.
  - For instance while 25% of FOUR’s audience are aged 15-24, just 6% of this age group tune in each day to FOUR compared to TV2 (33%), TV3 (30%) and TV ONE (20%).

- The most effective means of informing audiences of new New Zealand TV shows is via an on-air promo on the most popular TV channels – though word of mouth, particularly through Facebook, has grown significantly since 2014.

An increasingly big generational gap is the main driver of changes in media consumption.

- The 2014 study identified the variables that differentiated daily media consumption:
  - Primary; Age/life stage
  - Secondary; Ethnicity, and Technology
  - Other; Gender, Region, and Socio-economic level
- In 2016 the variables that differentiate daily media consumption have consolidated into simply:
  - Primary; Age/life stage
  - Other; Technology, and Region
- The influence of age/life stage appears to have increased since 2014 resulting in a more marked generational difference. The divide between generations is typically between under 40 and over 45, although it varies to some extent between media.
- In 2014 the only sub-group in the population among whom linear TV did not attract the biggest audience was Asian people. In 2016 this behaviour is more widespread. **In 2016, more 15-34 year olds tune in to online video on sites such as YouTube or Facebook each day than watch linear TV.**
- **Among 45+ year olds traditional media remains dominant.**
- The influence of the other differentiators appears to have decreased since 2014. In particular there are no significant differences between males and females in terms of daily media consumption.
- The influence of ethnicity and socio-economic level is also significantly lessened in 2016.

The chart below summarises how big the difference between generations now is.



- **Among 15-39s,** two thirds still watch TV each day, but online video has overtaken linear TV, and music streaming has overtaken broadcast radio.
- 15-39s consume <u>all</u> online media significantly more than 45+ year olds.
- **Among 45+** New Zealanders traditional media is still dominant.
- Note that the younger and older the age groups, the bigger these differences are.

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

Base: All respondents: (15-39 n=576; 45+ n=707)

Q1: We'd like to ask you about the different types of entertainment you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes of more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Technology differentiation - access to technology is an intrinsic driver of the generational gap in media behaviour.

- Incidence and access to different technologies has changed since 2014:
  - Access to TVs, radios, SKY TV and PVRs has fallen slightly.
  - Access to smartphones, tablets and smart TVs connected to the internet has grown significantly.
  - UFB, SVOD services and devices like Chromecast have launched and quickly established themselves in a significant proportion of homes.
- In 2014 access to smartphones and tablets were key differentiators of media behaviour, but as their penetration has grown their role as a differentiator has declined.
- In 2016 the devices and technologies that most differentiate behaviour are smart TVs connected to the internet, UFB, SVOD services and devices like Chromecast.
- Consumers who can access these technologies are heavy media consumers overall and are significantly more likely to engage in all forms of media, and especially online media.
- These key technologies are concentrated among younger New Zealanders. They enable this generation to consume more online media than older generations.
- Thus technology and younger New Zealanders are intrinsically linked to changing media consumption. In combination this drives greater digital media consumption and starts to erode the younger generation's connection to traditional broadcast media.

Life stage also plays a role in differentiating audience behaviours.

- Along with significant differences in daily media consumption by age, there are also significant differences in terms of life stage. These are intertwined and difficult to separate in terms of which drives behaviour.
- For instance similar differences in behaviour seen between younger and older New Zealanders are also seen throughout the data between:
  - Students compared with retirees.
  - Flatters, single and double income young couples with no kids compared with empty nesters and older singles.
  - High compared with low income earners.
- This report cannot answer the question of whether younger New Zealanders' current media consumption patterns will continue as they age, or whether their behaviour will modify as they move in to later life stages to more closely match current older New Zealanders.
- However does the strong link between younger New Zealanders and technology mean they are more likely to take their current media behaviour into later life stages?

Regional differentiation - Aucklanders are more engaged with online media, while South Islanders remain more engaged with traditional broadcast media.

- Aucklanders are significantly more likely to engage with SVOD, online video, and music streaming.
- South Islanders are more likely to engage with linear TV and broadcast radio.

Some differentiators have declined in influence since 2014:

- In 2014 ethnicity played a significant role in differentiating behaviour. In 2016 these differences are less strongly defined and influential.
    - However it should be noted that Asian New Zealanders demonstrate greater engagement with online media, and are also significantly more likely to have access to enabling technologies such as smart TVs connected to the internet, Netflix and Chromecast.
- There are very few significant differences between males and females' patterns of media consumption in 2016.

Perhaps the biggest single change in media consumption since 2014 is the growth of SVOD consumption since the launch of Netflix, Lightbox and Neon in NZ

- One in four New Zealanders (23%) tune in to an NZ or overseas SVOD service each day.
  - Nearly four in ten 15-39 year olds (38%) do so.
  - Those who watch SVOD content typically do so for 3 hours a day – nearly as long as a TV viewer watches TV each day.
- In an SVOD home linear TV still attracts the biggest daily audience (65%) – just. It is matched by online video via sites like YouTube and Facebook, and daily SVOD audiences are only slightly smaller (60%).
- SVOD viewing is driven slightly more by NZ sites (17% daily reach) than overseas sites (14%) – of which Netflix NZ delivers by far the biggest audience with 14% daily reach.
- SVOD viewing is most common each day among:
  - 15-39 year olds
  - Those with higher disposable income (double income, no kids couples and higher income earners)
  - Families
  - Aucklanders
  - Asian New Zealanders
  - Those with access to key enabling technology such as UFB.

There is a sea change underway in terms of music consumption – though less so in terms of radio listening.

- More New Zealanders now consume music via streaming each day (33%) than listen to music on CDs/iPods (27%). This is a significant change since 2014 when 23% listened via streaming and 38% listened to CDs/iPods.
  - This trend is exaggerated among younger New Zealanders – six in ten (59%) stream music daily compared to four in ten (39%) who listen to CDs/iPods.
  - YouTube (20% daily reach) and Spotify (13%) are the most popular streaming sites, followed by newer entrant Apple Music (5%).
- The sources New Zealanders use to find new music remain relatively unchanged with most New Zealanders relying on radio - on air and online (61%), or word of mouth (60%).
  - More New Zealanders (47%) are now using streaming services as a source of new music since 2014 (36%).
- This trend reflects the relative resilience of radio to changing media consumption. While there has been a decline in daily radio audiences overall, the daily reach of individual stations is relatively stable since 2014.
- In addition online radio, both NZ and overseas, has not grown significantly since 2014. This may be due to the growth in use of music streaming sites such as YouTube and Spotify.
  - iHeartRadio continues to reach 2% of New Zealanders each day.

NZ Ondemand use has grown since 2014 but not as rapidly as SVOD.

- Weekly and daily audiences on New Zealand Ondemand sites have grown significantly since 2014.
    - Four in ten now tune in each week, and nearly one in five do so each day.
- However the frequency of tuning in to NZ Ondemand sites has not grown significantly since 2014.
    - Nearly one in five New Zealanders use Ondemand sites each day. This equates to 45% of this media's total weekly reach. In 2014 these sites hit a similar 41% of their weekly reach each day.
    - Ondemand has the lowest frequency of use each week compared to TV, radio (on air and online), online video, SVOD, and music streaming.
- The decline in linear TV audiences overall, and the fact that six in ten Ondemand users continue to use these sites to catch up on TV content they have missed rather than using them as a content channel of choice, may explain why frequency of using Ondemand is not higher.

Use of unauthorised platforms has grown only slightly since 2014. Few New Zealanders participate frequently, and few new users have started engaging with these media since 2014.

- Growth in use of unauthorised platforms has typically come from some existing users increasing their frequency of involvement or expanding in to other unauthorised activities.
  - Streaming, downloading or torrenting TV shows from an overseas site continues to be the most common activity, however just one in ten (11%) do this weekly (up from 7% in 2014).
  - Using a VPN is second most common; up to 6% weekly reach from 3% in 2014.
  - Downloading songs or albums is the activity that the largest number of New Zealanders have ever done (30%), but it is the activity that the fewest do weekly (4%) and this has not increased since 2014.
- Younger New Zealanders are significantly more likely to engage in all these activities, but even among 15-34 year olds just one in four (23%) participate in the most common activity weekly (Streaming, downloading or torrenting TV shows from an overseas site), up from 16% in 2014.

Combining extra content online with linear TV extends engagement with TV shows for one in four consumers.

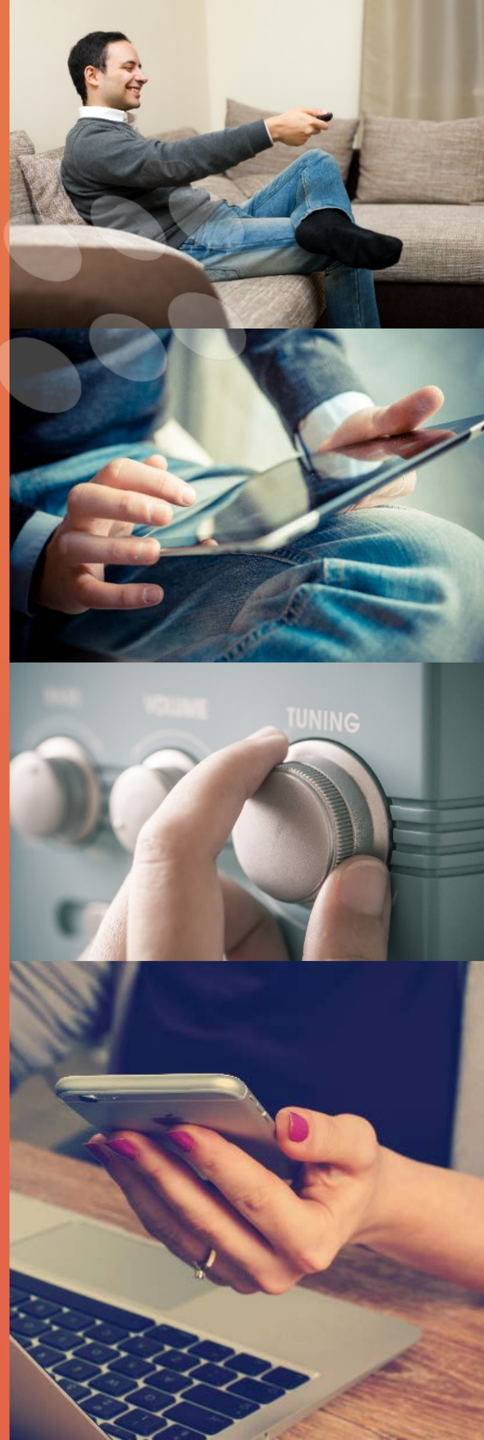
- One in four New Zealanders (25%) have ever looked for extra online material about a TV show, and nearly one in four of these people do so at least once a week.
  - This equates to 6% weekly reach of looking for extra online material among all New Zealanders.
  - These levels have not changed significantly since 2014 (5%).
- Females (28%) and 15-39 year olds (35%) are most likely to have ever engaged in this activity.
- The main source of searching for extra material is via Google search.

One in ten New Zealanders have ever watched a New Zealand made webseries.

- Questions relating to webseries were new in 2016.
- Although there is a stronger preference for online media among the youngest New Zealanders, webseries appeal most to a slightly older group of 25-44 year olds – 16% of this group have ever watched a New Zealand made webseries.
- TVNZ Ondemand (55%) and YouTube/Vimeo (43%) are the most widely used sites to watch this content on.
- Word of mouth such as social media (52%) and friends and family (47%) are the most common sources of information about webseries.
  - NZ Ondemand sites (32%) are third most widely used.
  - TV ads are fourth (24%).

Usage of captioning has grown significantly since 2014, while audio description has remained stable.

- One in six New Zealanders (17%) ever use captioning while watching TV in 2016, compared to one in ten in 2014.
- 3% of New Zealanders ever use audio description while watching TV.



DAILY MEDIA CONSUMPTION

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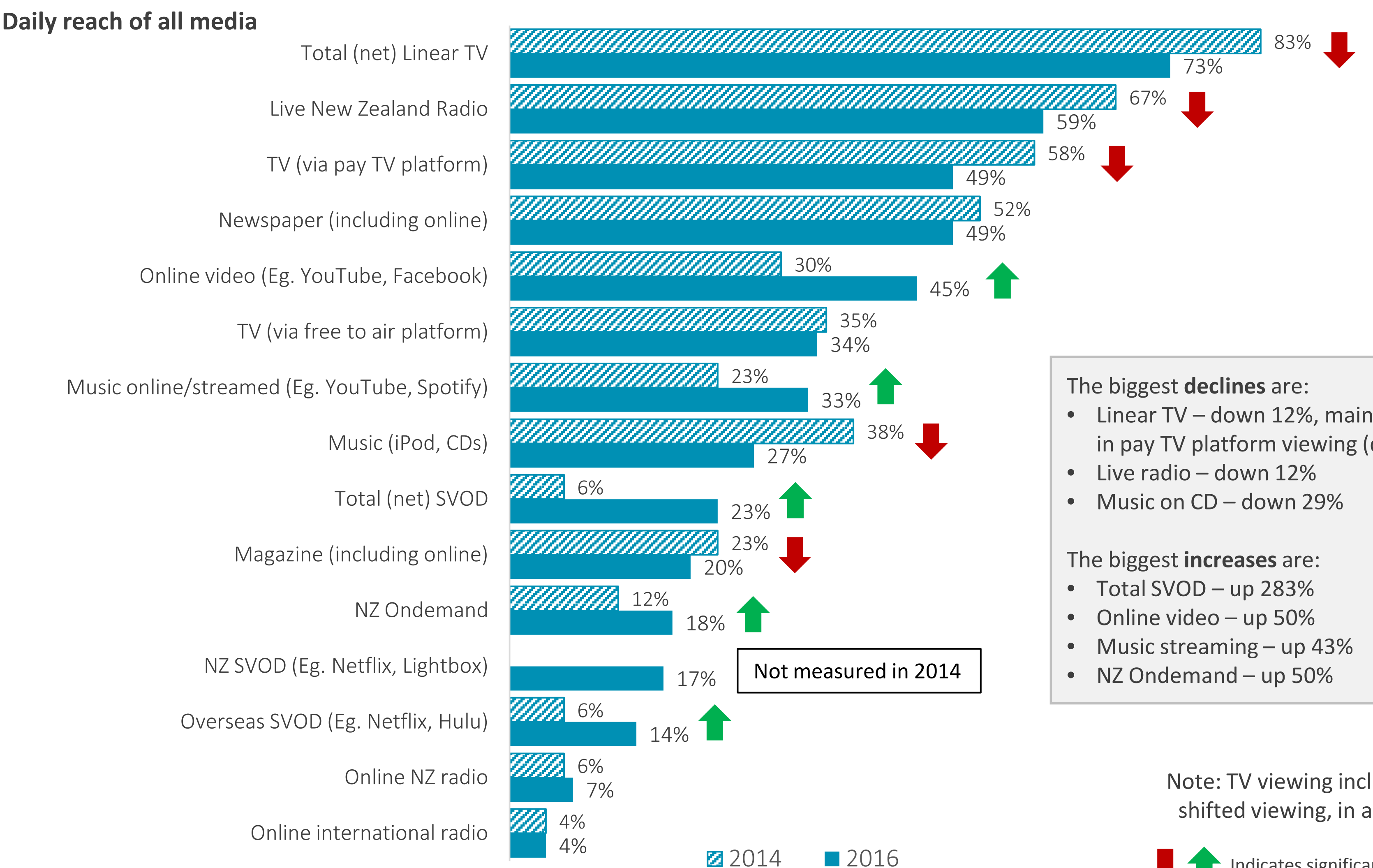
Linear TV (73% daily reach) and radio (59%) remain the most popular media among New Zealanders. However audiences for nearly all traditional media have declined since 2014 whereas nearly all online media have grown significantly.



The biggest **declines** are:

- Linear TV – down 12%, mainly due to a fall in pay TV platform viewing (down 16%)
- Live radio – down 12%
- Music on CD – down 29%

The biggest **increases** are:

- Total SVOD – up 283%
- Online video – up 50%
- Music streaming – up 43%
- NZ Ondemand – up 50%

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

Indicates significant change at 95% c.i.

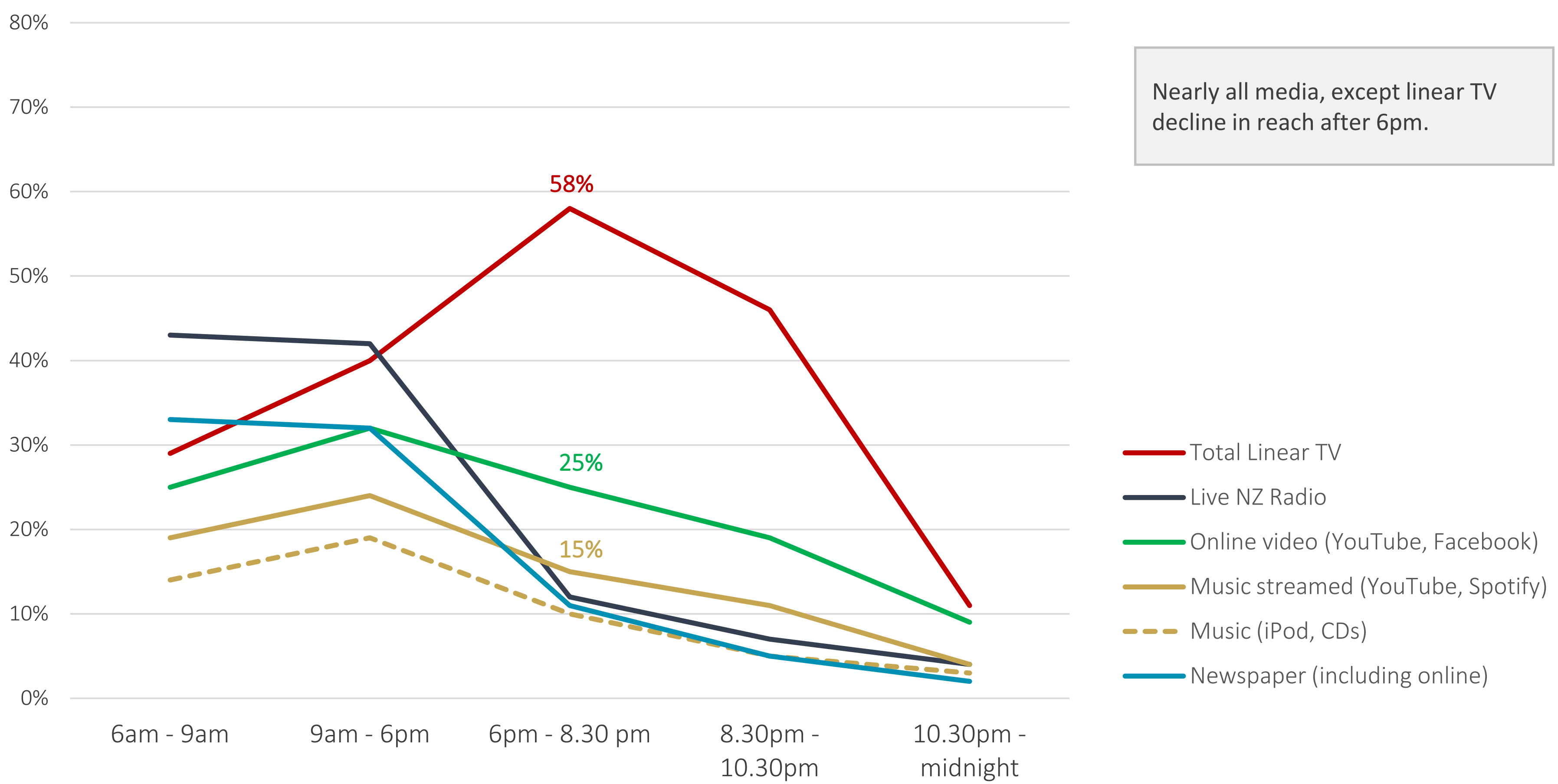
Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q1: We'd like to ask you about the different types of entertainment you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes of more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Radio and newspapers (including online) continue to start many New Zealanders days, but few engage after 6pm when linear TV takes over.
Online video peaks during the day, but it is now the second most common activity after 6pm.

Daily reach of all media

% of all NZers



Nearly all media, except linear TV decline in reach after 6pm.

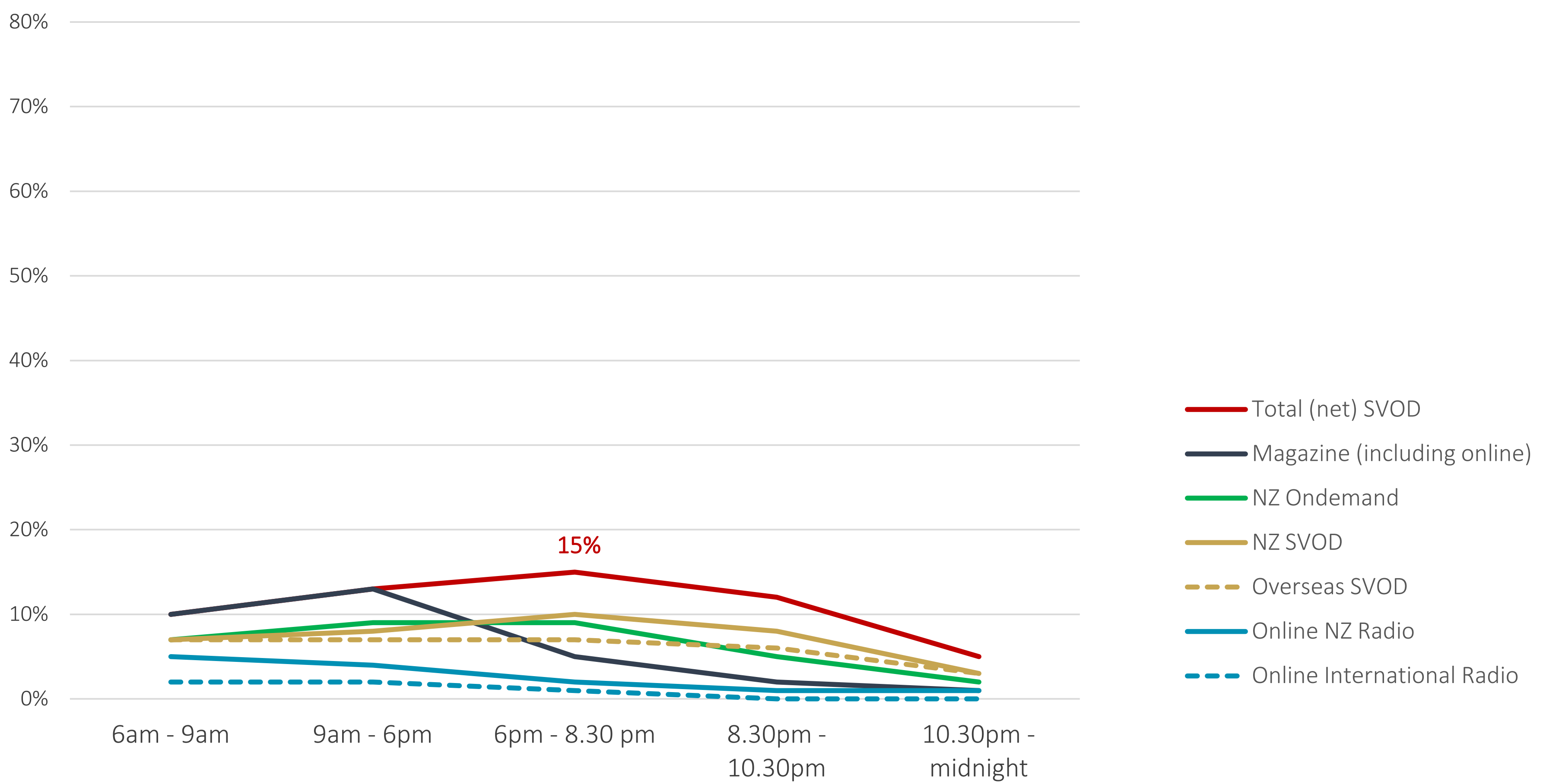
Base: All respondents (2016; n=1,404)

Q1: We'd like to ask you about the different types of entertainment you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes of more during the time period I read out. It doesn't matter if you were also doing something else at the time.

SVOD audiences peak between 6-8.30pm (15%) and this becomes the third most common activity (with music streaming). SVOD is one of the few media that increases its reach after 6pm.

Daily reach of all media

% of all NZers



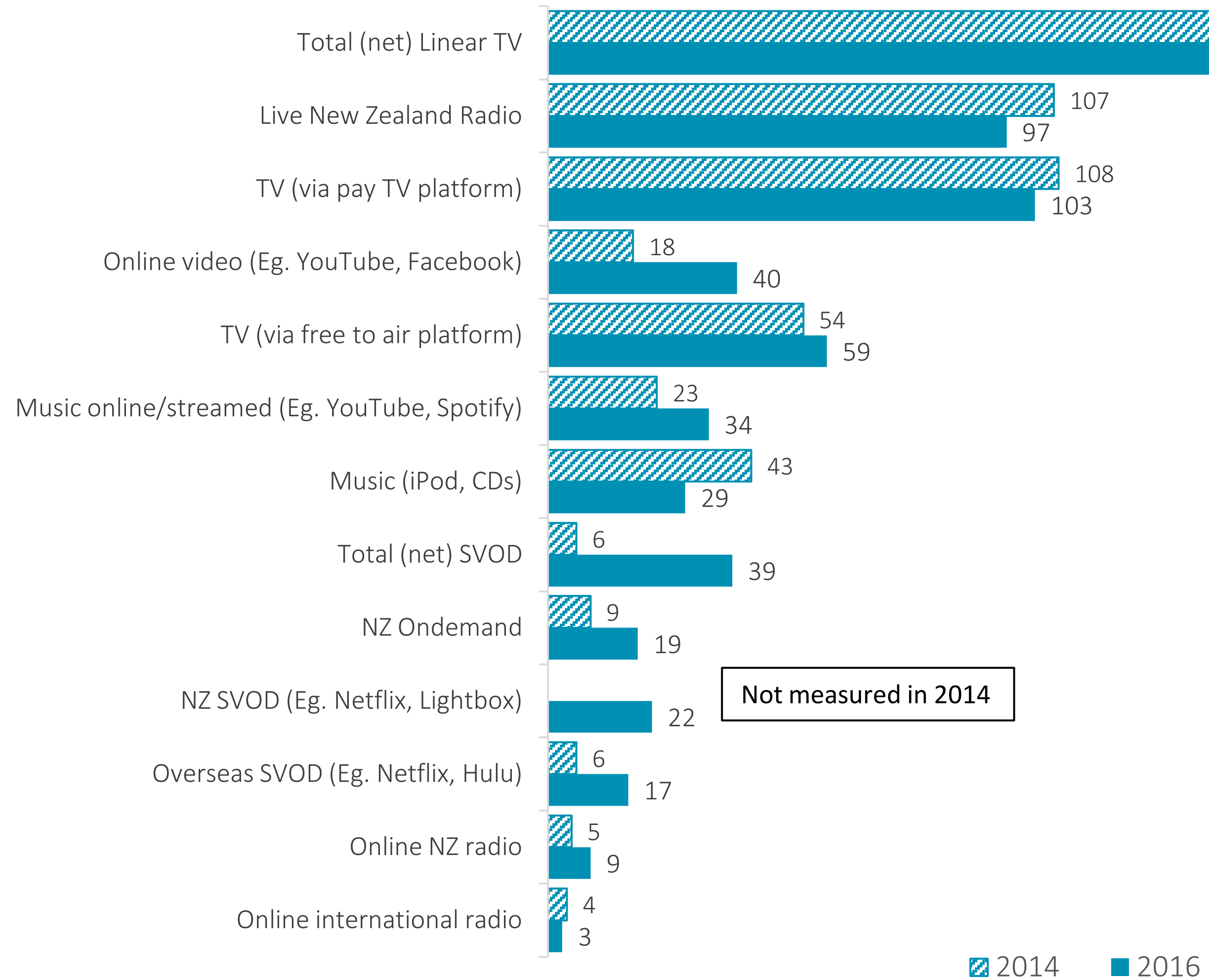
Base: All respondents (2016; n=1,404)

Q1: We'd like to ask you about the different types of entertainment you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes of more during the time period I read out. It doesn't matter if you were also doing something else at the time.

New Zealanders continue to spend the most time with traditional broadcast media by a considerable margin, and this time spent has not changed since 2014. However there have been large increases in time spent with online video and SVOD content.

Total time spent over the day

Average minutes per day among all New Zealanders



Given daily reach of TV and radio has declined, these results showing stable time spent each day suggests the audiences these media have lost tend to be lighter viewers and listeners.

Note: in this chart average total minutes are based on all people and so include those who did not do each activity (Ie. zero minutes).

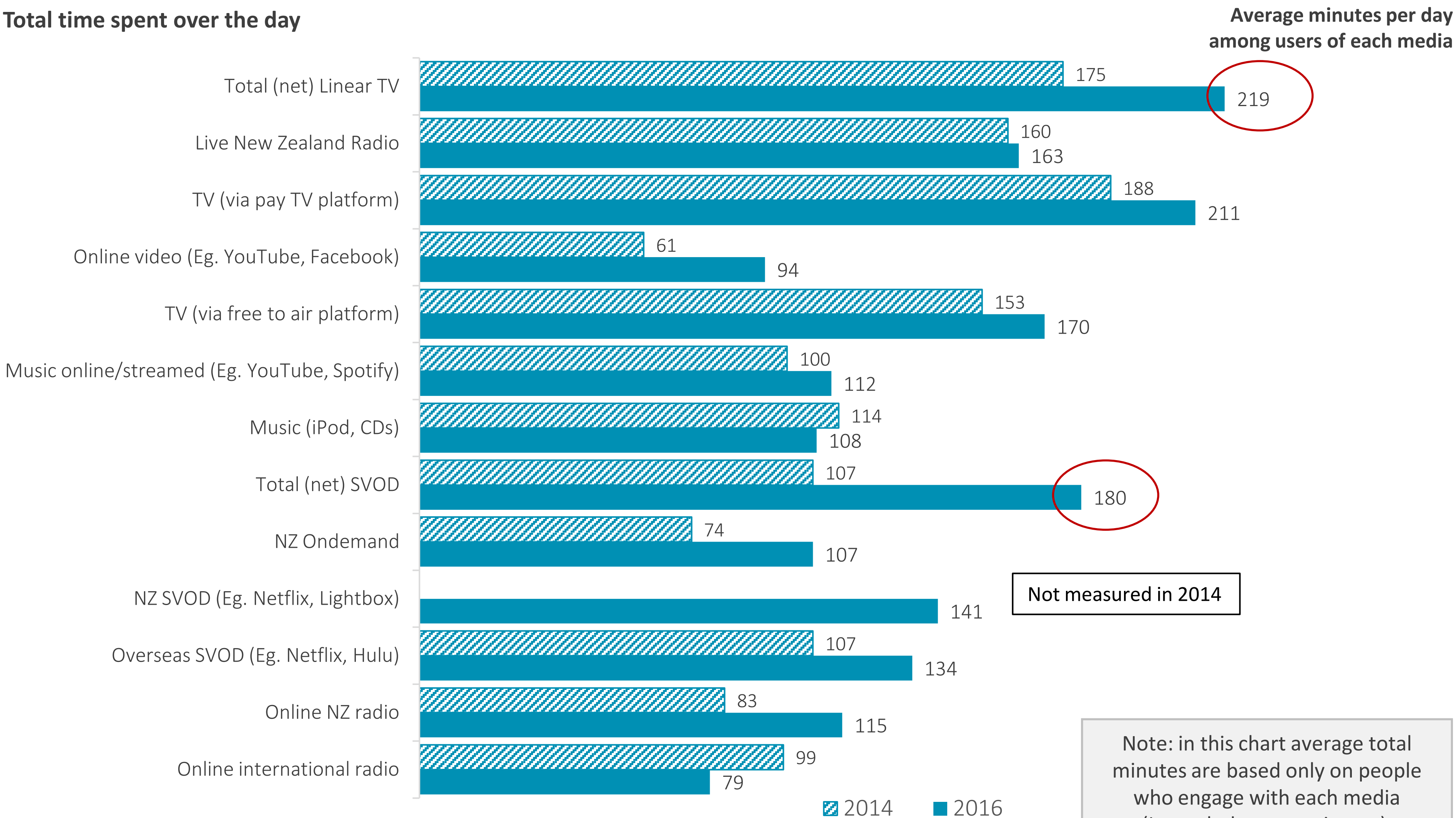
Media ranked in order of daily reach.

Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q2: Between (TIME PERIOD) about how long did you (activity) for?

Among users of each media, TV attracts the most time per day, with SVOD users not far behind. Increased reach and time spent with online video, SVOD, and Ondemand indicate these media are now a much bigger part of many more people's lives since 2014.

Total time spent over the day



Note: in this chart average total minutes are based only on people who engage with each media (Ie. excludes zero minutes).

Media ranked in order of daily reach.

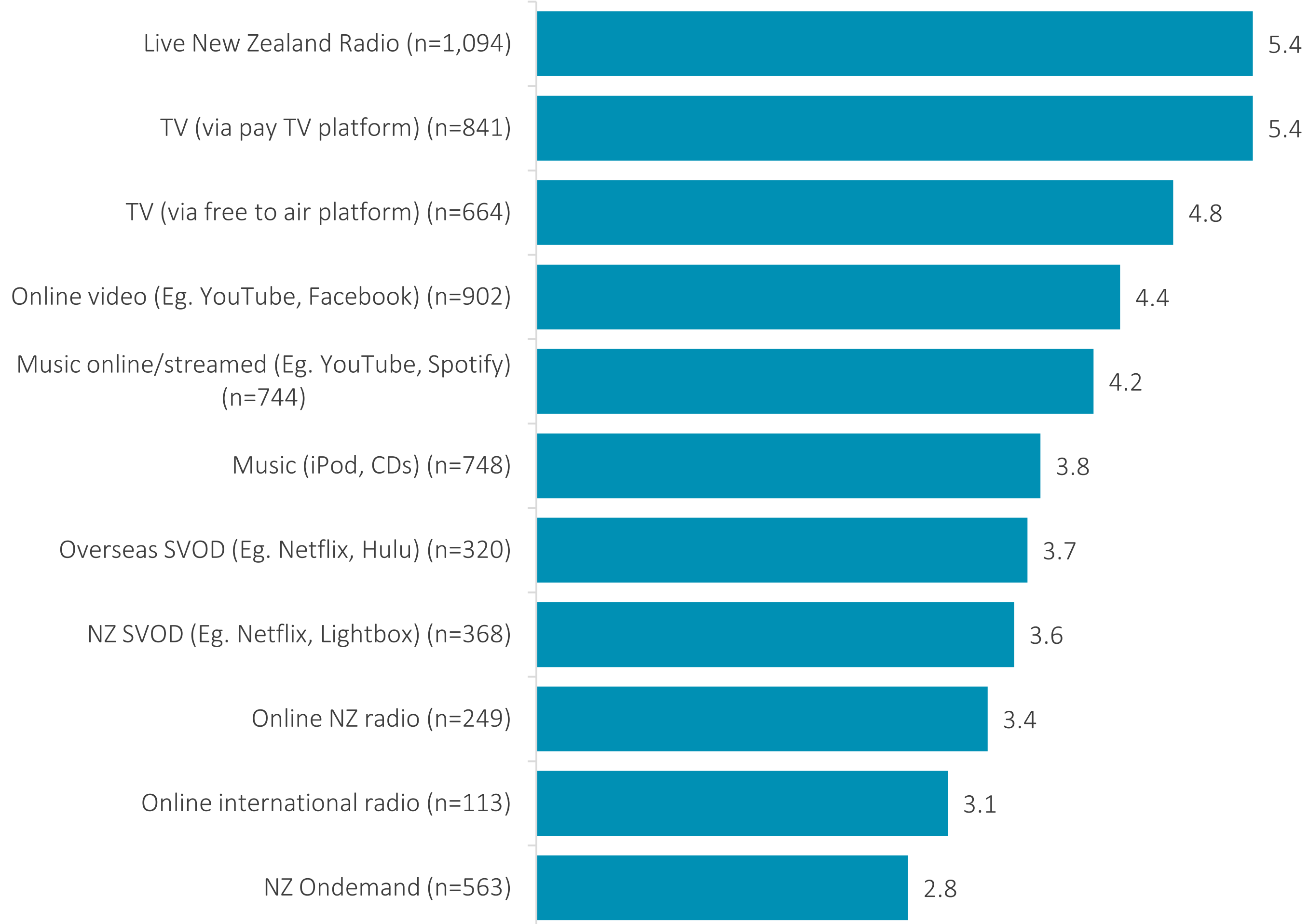
Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q2: Between (TIME PERIOD) about how long did you (activity) for?

Not only do New Zealanders continue to dedicate the most time each day to watching TV and listening to radio, users of these media tune in significantly more frequently each week, than users tune in to other media.

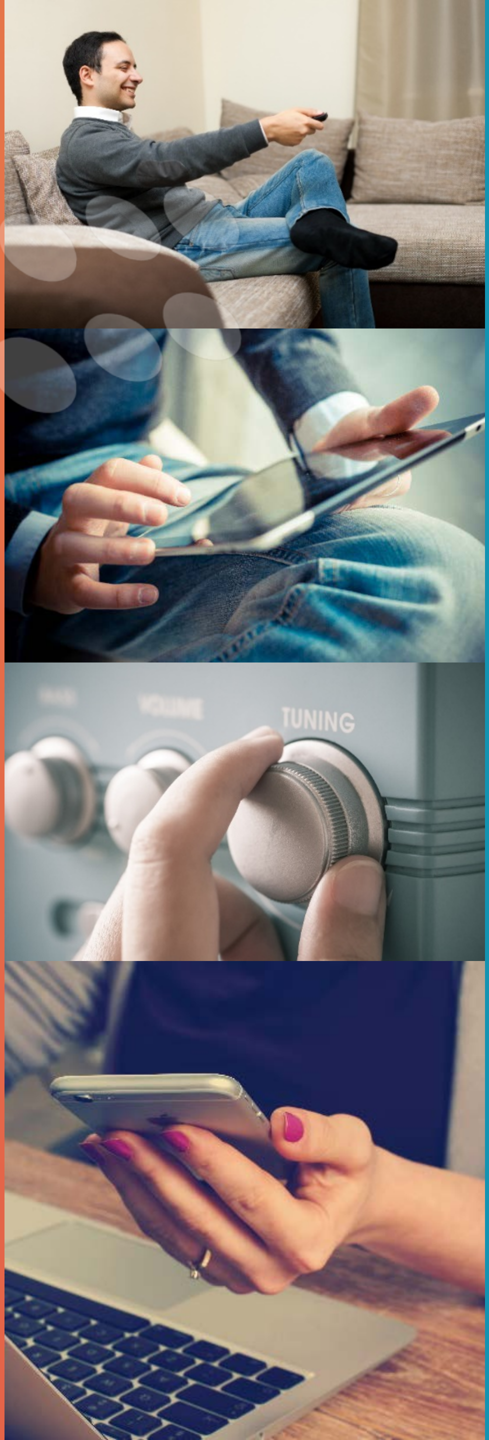
Average number of days per week

Based on users of each media



Base: All who engage with each media in a typical week

Q8: I'd now like you to think about what you do over a typical week. Please indicate about how many days per week you would usually do each of the following?



WHICH NEW ZEALANDERS ARE DRIVING CHANGE?

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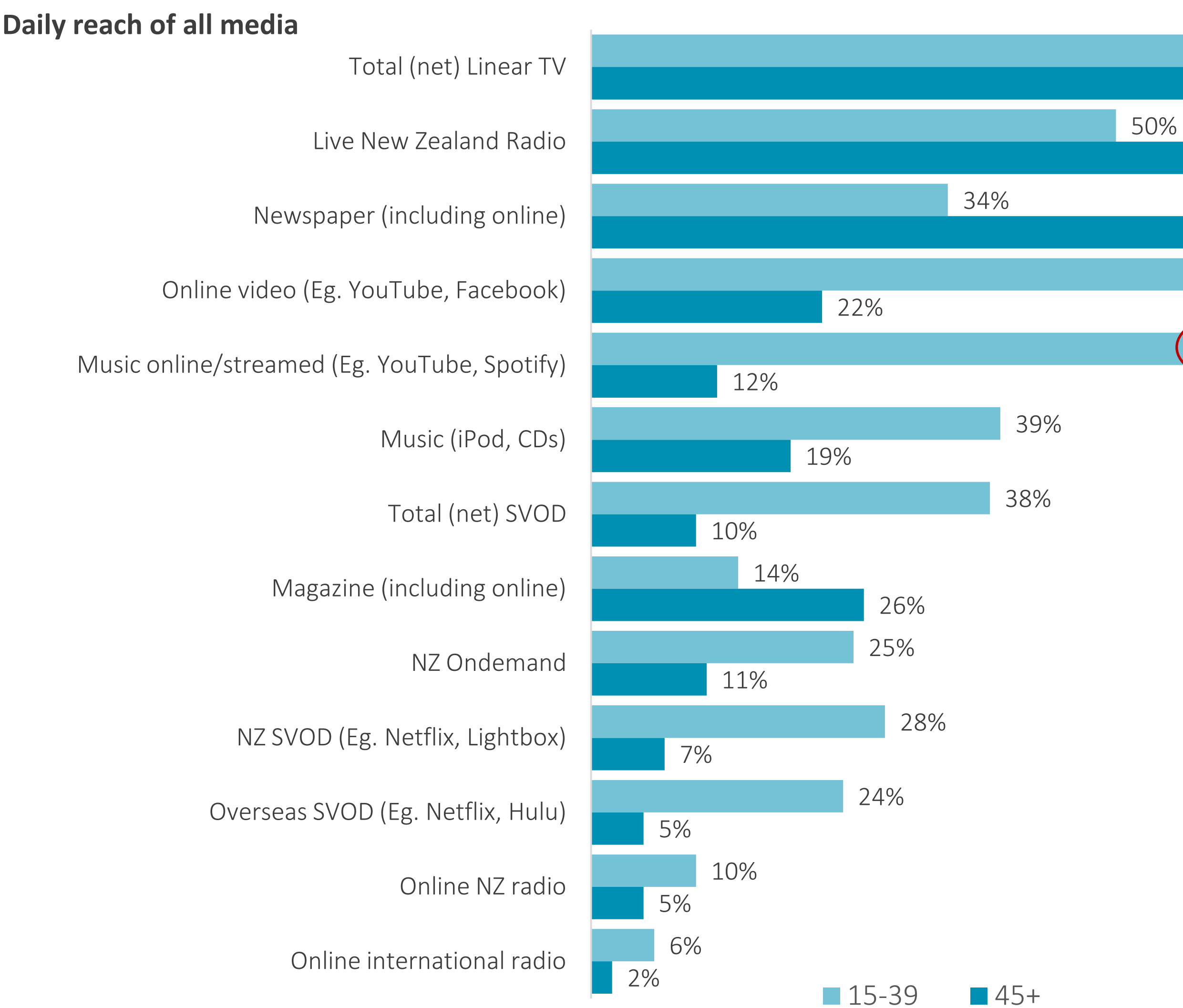
The differentiators of media consumption have simplified to age/life stage, access to technology, and region. Differences in age/life stage are the most important.

- In 2014 there were several differentiators of media consumption:
  - Primary differentiator; age/life stage
  - Secondary differentiators; ethnicity and technology
  - Other differentiators; gender, region, and socio-economic level
- In 2016 these have consolidated in to simply:
  - Primary differentiator; **age/life stage**
  - Secondary differentiator; **technology**
  - Other differentiator; **region**
- **Of these age/life stage is by far the most influential with significant differences apparent on nearly all measures in this study.**
- That there is a significant difference in media consumption between younger and older New Zealanders is no surprise. However this difference appears to be widening and driving the significant changes we are seeing in overall media consumption.
- For instance, in 2014 the only sub-group in the population among whom linear TV did not attract the biggest daily audience was Asian people. **In 2016 more 18-34s tune in to online video each day on sites like YouTube and Facebook than watch linear TV.**

An increasingly big generational gap is driving changes in New Zealanders' media consumption.

- The specific age divide in media behaviour between younger and older New Zealanders varies to some extent between media, but it is typically seen between 15-39 year olds and 45+ year olds.
    - Of course differences are most exaggerated at either end of the age spectrum between say, 15-29s and 55+ year olds.
- 15-39 year olds consume all online media plus music on CDs/iPods significantly more each day than 45+ year olds.
    - Among this age group, online video consumption via sites such as YouTube and Facebook has overtaken linear TV, and streaming music has overtaken broadcast radio.
- Among 45+ year olds, traditional media remains dominant.
    - Linear TV (81% daily reach), broadcast radio (66%), newspaper - including online (62%).
    - Of online media, online video via sites like YouTube and Facebook delivers the biggest daily reach 22% among this age group. Total SVOD daily reach is 10% among 45+ year olds, compared to 38% among 15-39 year olds.
- These differences between age groups are significantly greater than in 2014.

The fact there is a difference in media consumption between younger and older New Zealanders is no surprise, however the chart below summarises how big that difference now is.



- **Among 15-39s,** two thirds still watch TV each day, but online video has overtaken linear TV, and music streaming has overtaken broadcast radio.
- 15-39s consume all online media significantly more than 45+ year olds.
- **Among 45+** New Zealanders traditional media is still dominant.
- Note that the younger and older the age groups, the bigger these differences are.

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

Base: All respondents: (15-39 n=576; 45+ n=707)

Q1: We'd like to ask you about the different types of entertainment you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes of more during the time period I read out. It doesn't matter if you were also doing something else at the time.

Other Differentiators Of Media Consumption

TECHNOLOGY:

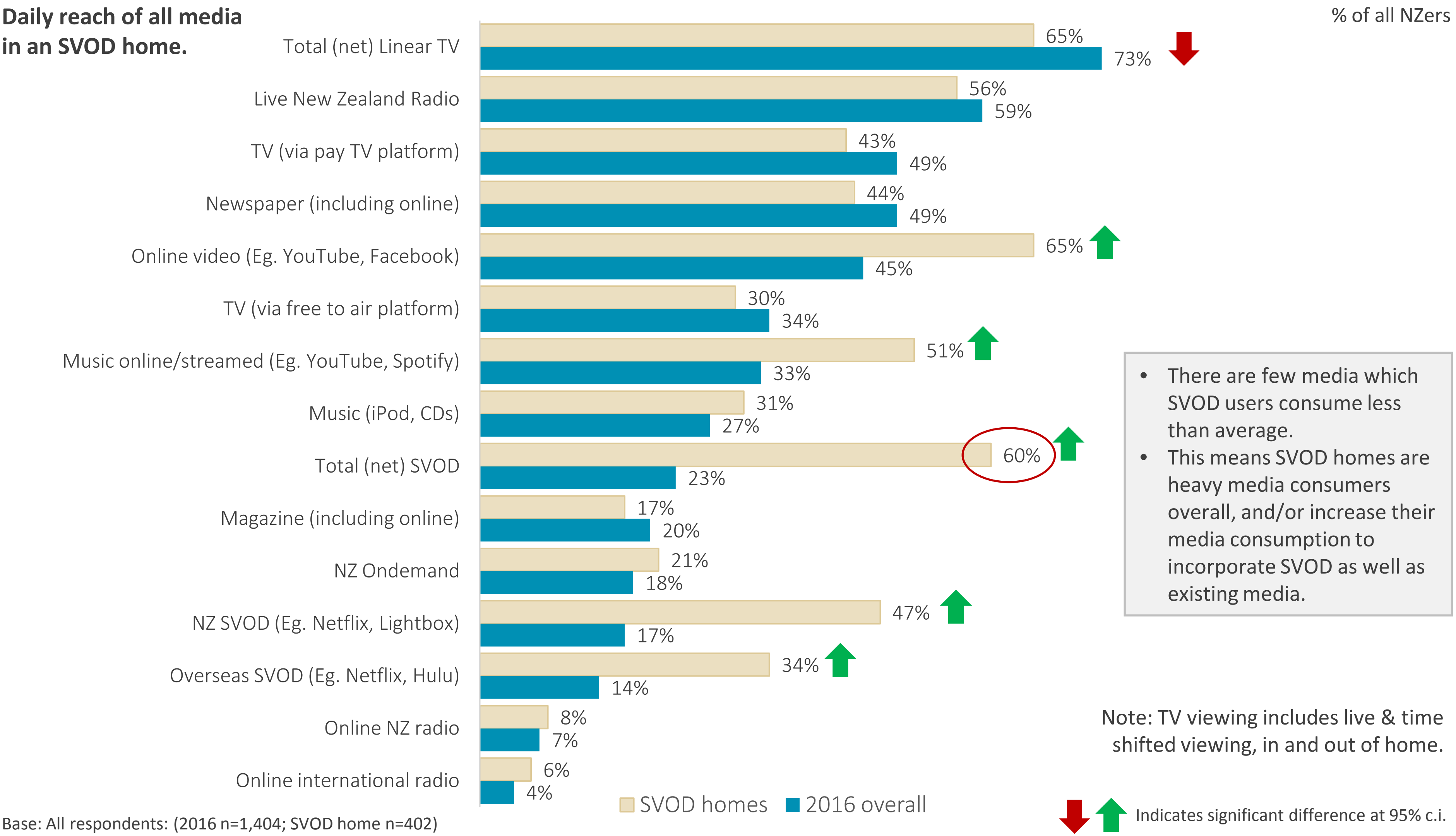
- As in 2014 the types of technology consumers have access to impacts on the type and amount of media they consume. However the technologies that most differentiate media consumption have changed since 2014.
- As penetration of some technology has grown, the degree to which that differentiates behaviour has declined;
  - For instance the role of smartphones and tablets in differentiating behaviour has declined since 2014 as the number of people who have access to them has grown.
- Other, mainly newer, technology is now more influential - particularly access to Smart TVs, UFB, Chromecast and of course, access to SVOD. **Consumers who can access these technologies are significantly more likely to engage in all online media (SVOD, online video, Ondemand and music streaming).**
- Our data shows that younger New Zealanders are among those most likely to have adopted many of these key technologies. This will be partly driving the generational gap in media consumption.
- The links between youth, technology and behaviour suggest that young New Zealanders' current behaviour might be more likely to be taken with them as they age.

REGION

- Consumers who live in Auckland tend to consume media differently to those in the South Island (with the rest of the North Island between these two groups);
  - Aucklanders are significantly more likely to engage with SVOD, online video and music streaming.
  - South Islanders are significantly more likely to engage with linear TV and radio.

Let's have a quick look at media consumption in an SVOD home (29% of all homes). Linear TV (65%) is still the most popular media, just – but SVOD reaches 60% daily reach in an SVOD home.

Daily reach of all media in an SVOD home.

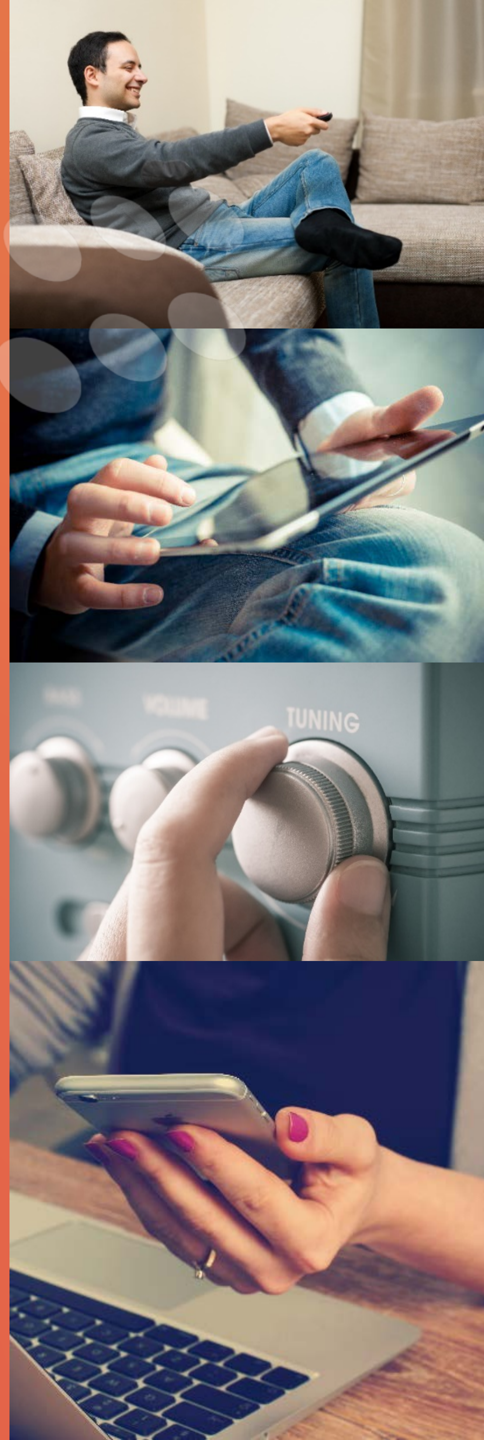


- There are few media which SVOD users consume less than average.
- This means SVOD homes are heavy media consumers overall, and/or increase their media consumption to incorporate SVOD as well as existing media.

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

Base: All respondents: (2016 n=1,404; SVOD home n=402)

Q1: We'd like to ask you about the different types of entertainment you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes of more during the time period I read out. It doesn't matter if you were also doing something else at the time.



DAILY MEDIA CONSUMPTION BY CHANNEL, SITE & STATION

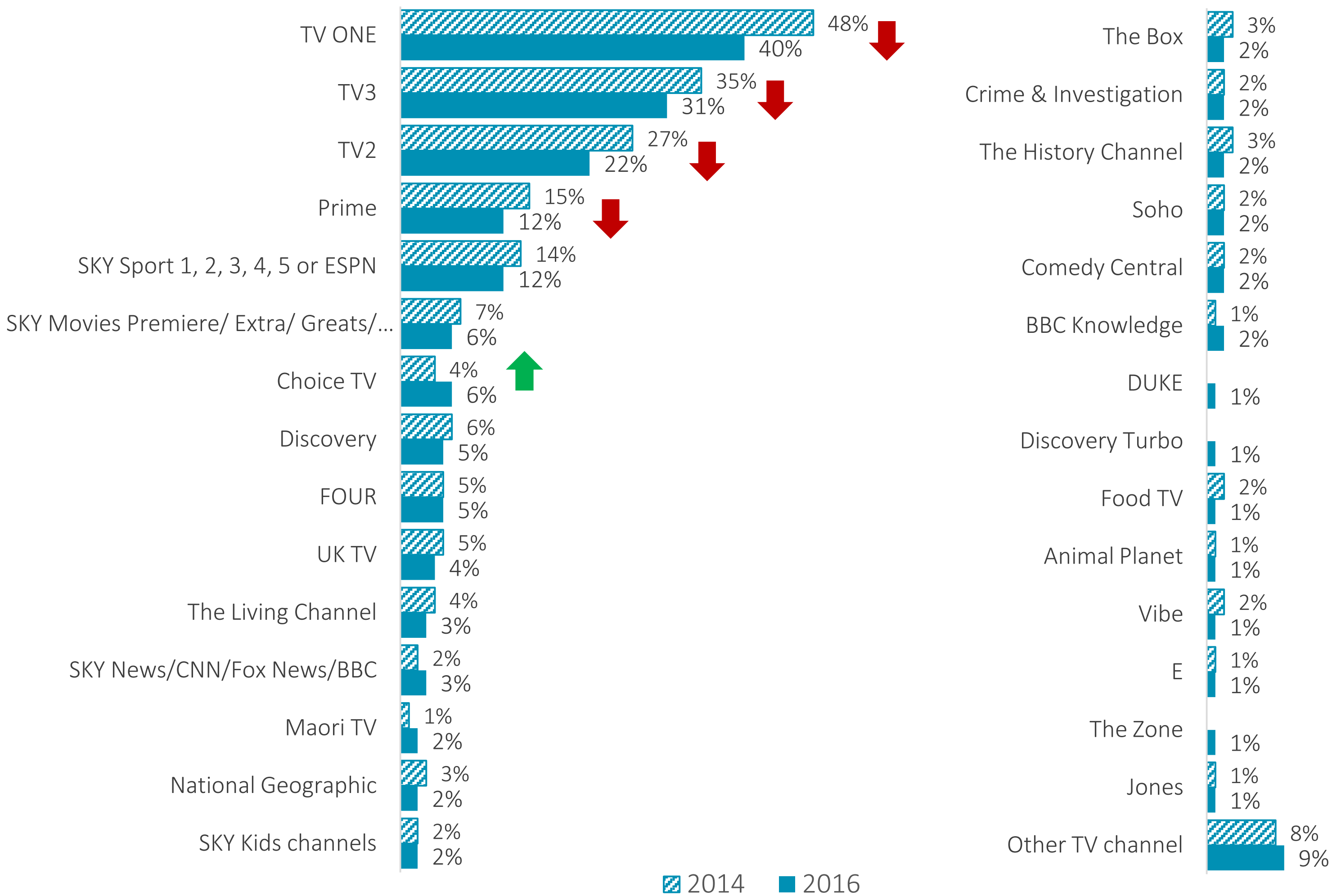
Glasshouse

NZ On Air
Irirangi Te Motu

The daily reach of the four main FTA channels has fallen significantly since 2014. Choice TV is the only channel to show significant growth. Only YouTube (35%) and Facebook (28%) deliver comparably sized daily audiences as TV ONE, TV2 and TV3.

Daily reach of TV channels

% of all NZers



Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q3: Thinking about yesterday overall, which of the following TV channels did you watch?

Indicates significant change at 95% c.i.

Where are the niche and hard to find audiences?

- **As in 2014 niche and harder to find audiences are found in the largest numbers on the biggest FTA channels.**
- While the audiences of some more targeted channels do achieve a higher share among their target audience, their relatively small audience size means their daily reach of these audiences is lower than the largest channels.
- For instance:
  - 25% of FOUR's daily audience is 15-24 year olds, but the channel only delivers a daily reach of this audience of 6% compared to TV2 (33%), TV3 (30%) and TV ONE (20%).
    - It should be noted that YouTube (72%) and Facebook (57%) achieve significantly greater daily reach among this younger age group – albeit in more fragmented content environments.
  - 46% of Māori TV's daily audience are Māori, but the channel only delivers a daily reach of 8% among this audience, compared to TV3 (40%), TV ONE (36%) and TV2 (31%).

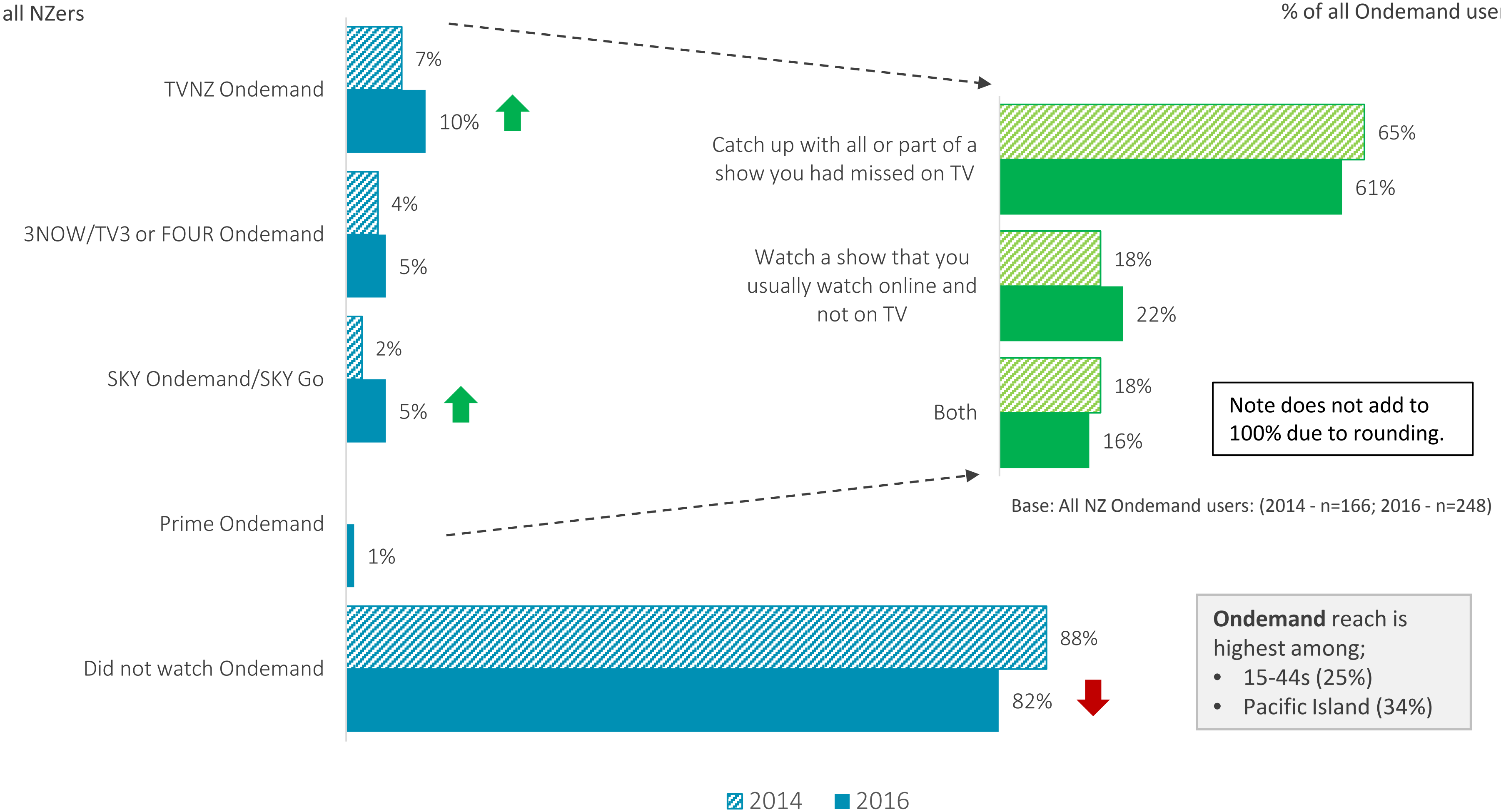
There has been a slight increase since 2014 in the daily reach of Ondemand overall, driven by TVNZ and SKY TV sites. However there has been no significant change in how consumers use these sites – the majority continue to do so to catch up on content they missed on air.

Daily reach of NZ Ondemand sites

% of all NZers

Why used Ondemand yesterday

% of all Ondemand users



Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q4a: Thinking about yesterday overall, which of the following websites did you watch?

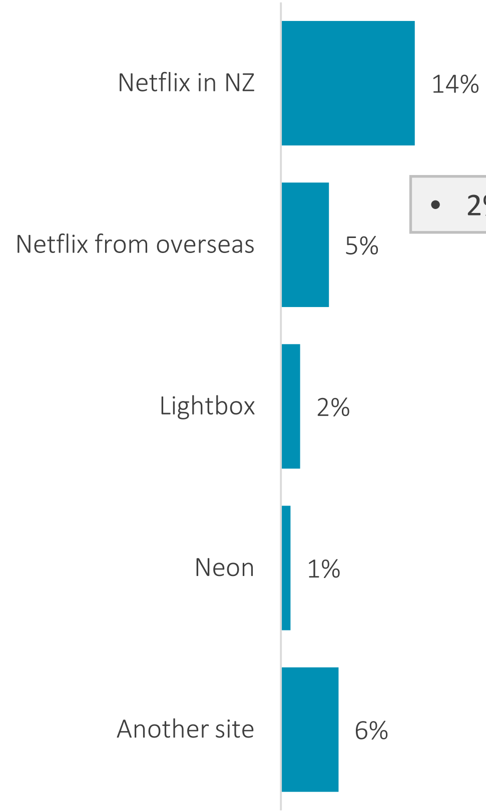
Q7a: Thinking about when you used TVNZ, 3NOW, Prime or SKY Ondemand yesterday, did you use it to…?

Indicates significant change at 95% c.i.

The growth of SVOD is perhaps the biggest change in media since 2014 – 23% of New Zealanders now watch SVOD each day.
Netflix NZ captures the biggest daily audience of any SVOD site.

Daily reach of SVOD services

% of all NZers



- 2% in 2014

- 17% of NZers watch a NZ SVOD service each day.
- 14% of NZers watch an overseas SVOD service each day.
- Most likely to use Netflix NZ:
  - 15-29s (29%)
    - Students (29%)
    - Flatting (30%)
  - Double income couples, no kids (25%)
  - 5+ people homes (23%)
  - Aucklanders (18%)

Base: All respondents: (2016 - n=1,404)

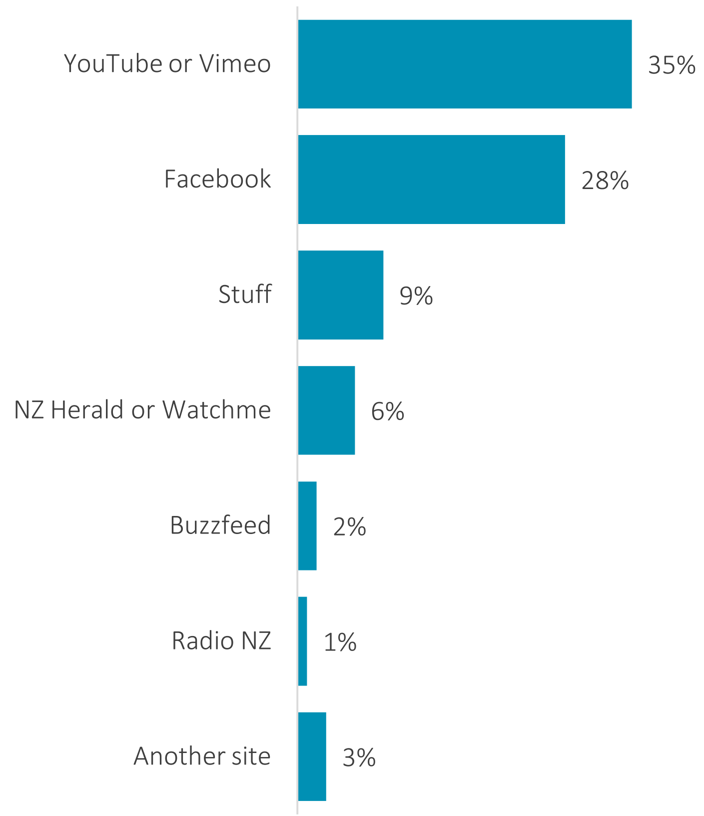
Q4b: Thinking about yesterday overall, which of the following websites/services did you use to watch TV shows?

New question in 2016.

YouTube and Facebook dominate New Zealanders' choice of online video sites.

Daily reach of online video sites

% of all NZers



The profiles of the two most popular sites are very similar except the difference in males and females.

Most likely to view YouTube/Vimeo:
- **Males (37%)**
- 15-24 (72%)
    - Students (72%)
    - Low income earners (up to $20k = 51%)
- 4+ people homes (31%)
- Pacific Island (54%)

Most likely to view Facebook:
- **Females (32%)**
- 15-29 (55%)
    - Students (60%)
    - Low income earners (up to $20k+ = 36%)
- 4+ people homes (40%)
- Pacific Island (47%)

Base: All respondents: (2016 - n=1,404)

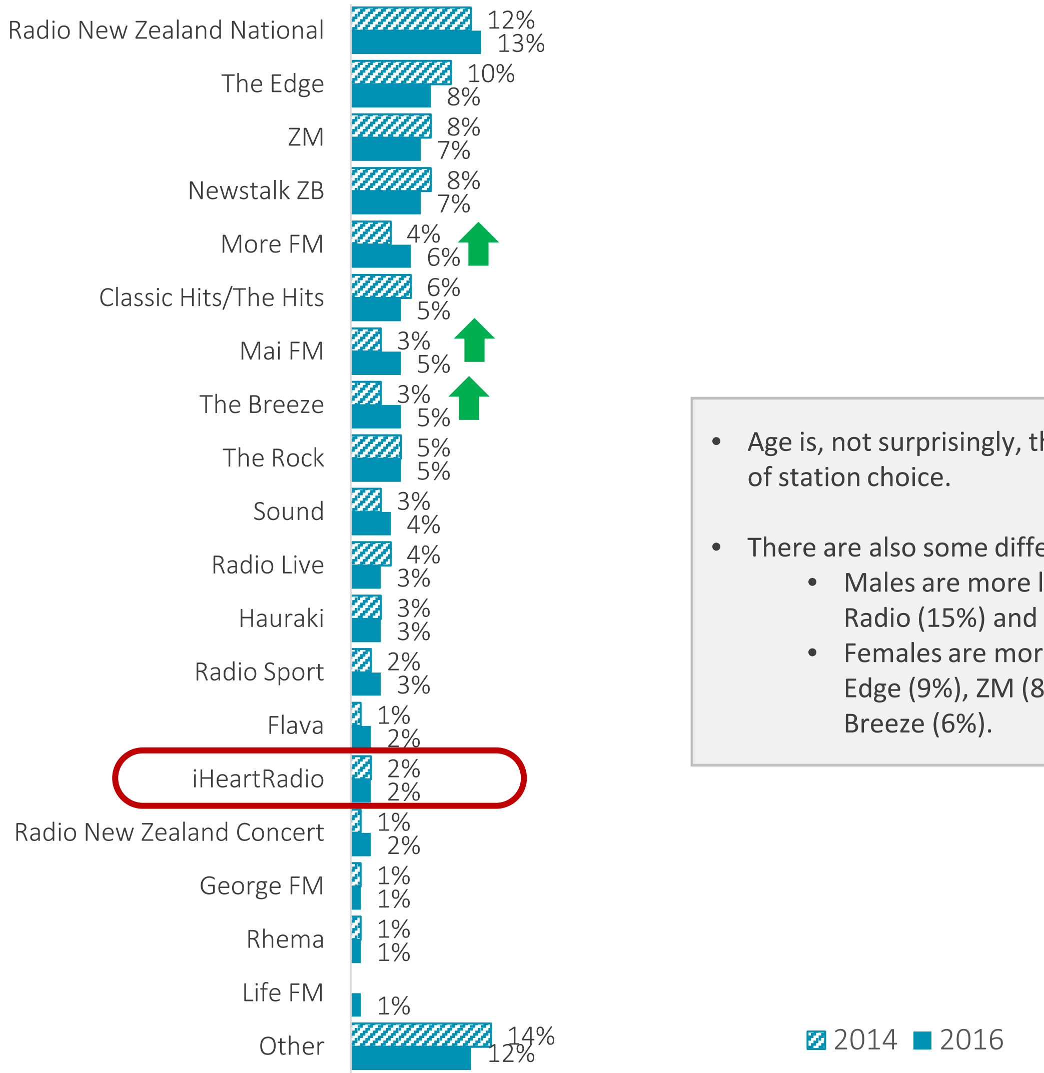
Q4c: Thinking about yesterday overall, which of the following websites did you use to watch video?

New question in 2016.

There has been little significant change in the popularity of radio stations since 2014. The exceptions are that More FM, Mai FM and The Breeze have increased their daily reach.

Daily reach of radio stations

% of all NZers



- Age is, not surprisingly, the biggest differentiator of station choice.
- There are also some differences by gender:
    - Males are more likely to listen to National Radio (15%) and Newstalk ZB (8%).
    - Females are more likely to tune into The Edge (9%), ZM (8%), Mai FM (6%) and The Breeze (6%).

Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

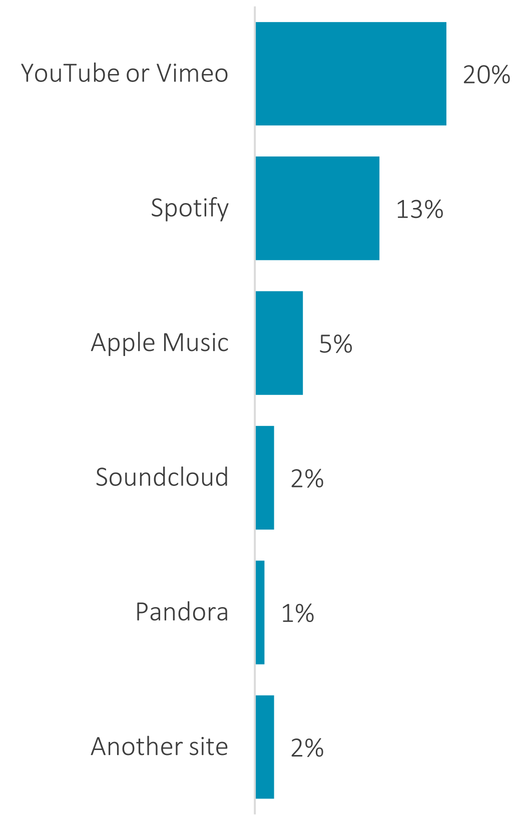
Q5a: Thinking about yesterday overall what New Zealand radio stations did you listen to either on radio or online?

Indicates significant change at 95% c.i.

YouTube/Vimeo and Spotify dominate New Zealanders' choice of music streaming sites. Apple Music, a relatively new entrant, is third on 5% daily reach.

Daily reach of music sites

% of all NZers



Age and gender are the most important differentiators of music sites:

- Males are more likely to listen to YouTube (23%), whereas females are more likely to use Spotify (15%).
- 15-34s are the most likely to use both sites (41% YouTube; 28% Spotify).

Base: All respondents: (2016 - n=1,404)

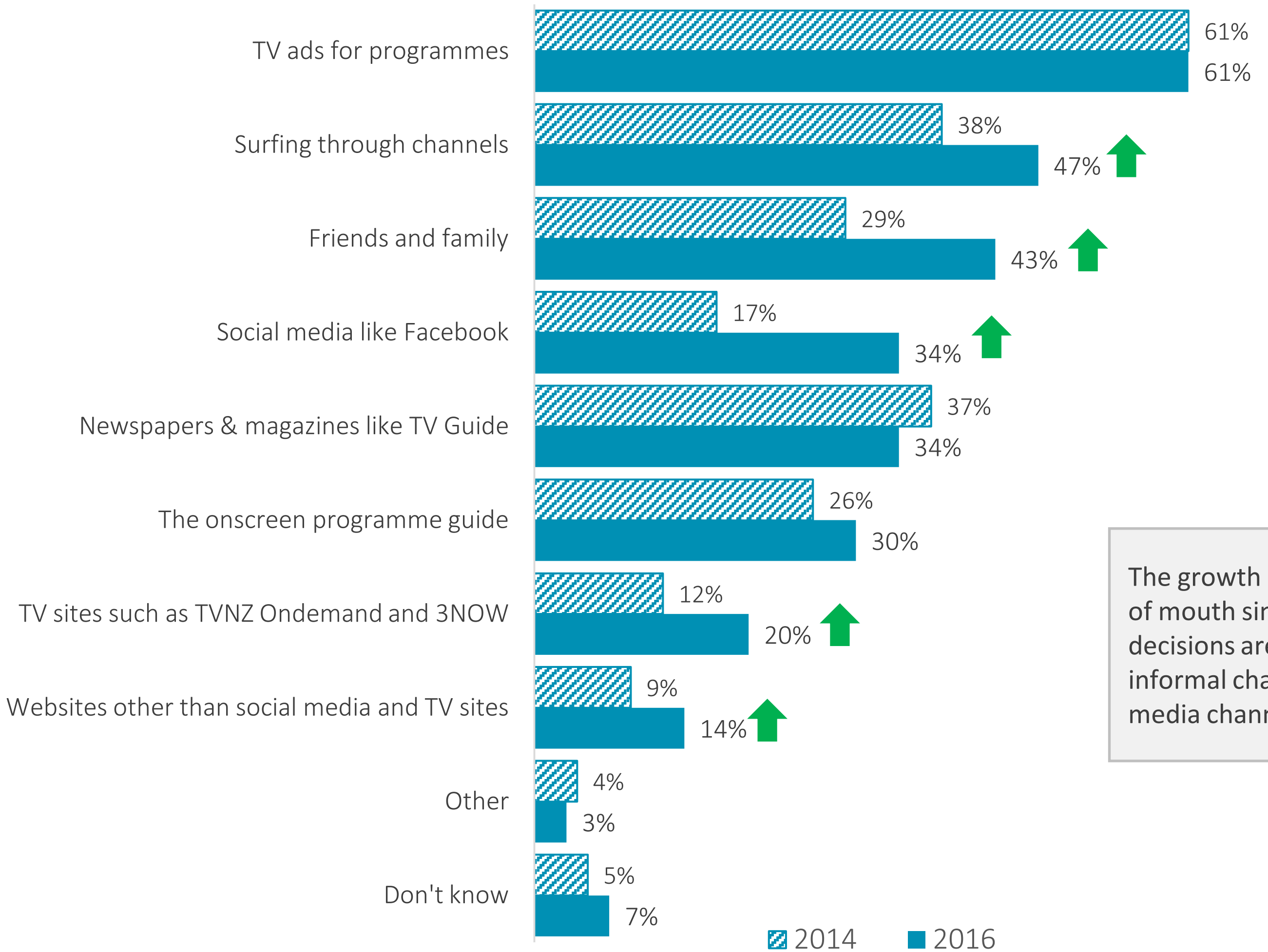
Q4c: Thinking about yesterday overall, which of the following websites did you use to listen to music online?

New question in 2016.

TV ads remain the most common source of information about NZ made TV shows, although there has been significant growth in use of channel surfing, word of mouth (friends & family or social media), Ondemand sites and other websites.

How people become aware of NZ made TV shows

% of all NZers

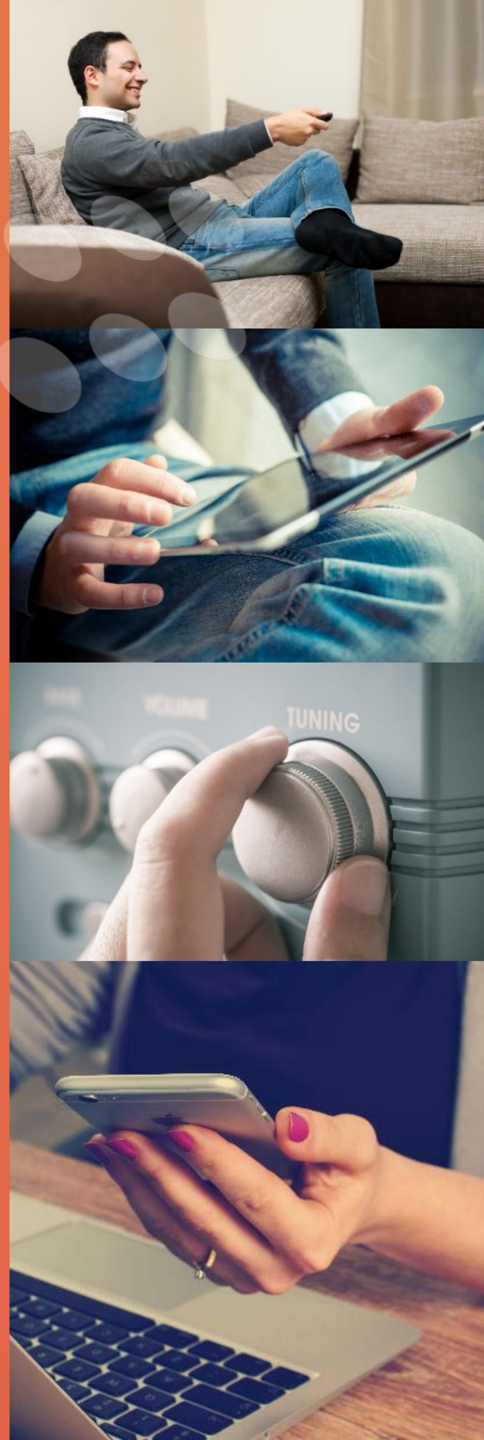


The growth of channel surfing and word of mouth since 2014 means that viewing decisions are now more influenced by informal channels, rather than traditional media channels.

Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q6: In which of the following ways do you usually become aware of New Zealand made TV shows?

Indicates significant change at 95% c.i.



MUSIC CONSUMPTION AND BEHAVIOUR

Glasshouse

NZ On Air
Irirangi Te Motu

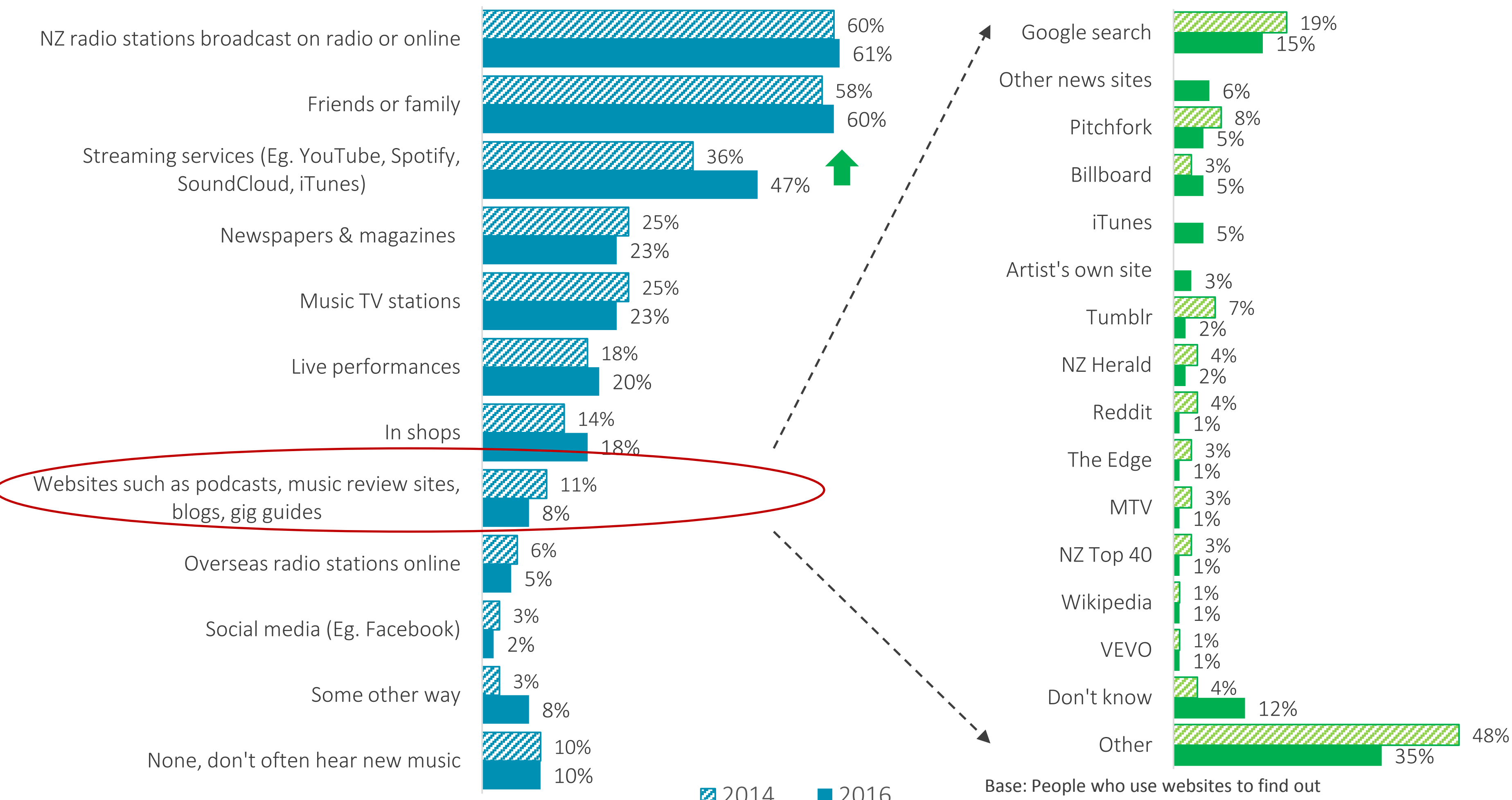
Radio and word of mouth remain the most common ways to find new music, though there has been significant growth in streaming sites as a source of new music since 2014. Usage of other websites remains highly fragmented.

Sources of awareness of new music

% of all NZers

Websites used

% of users



Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

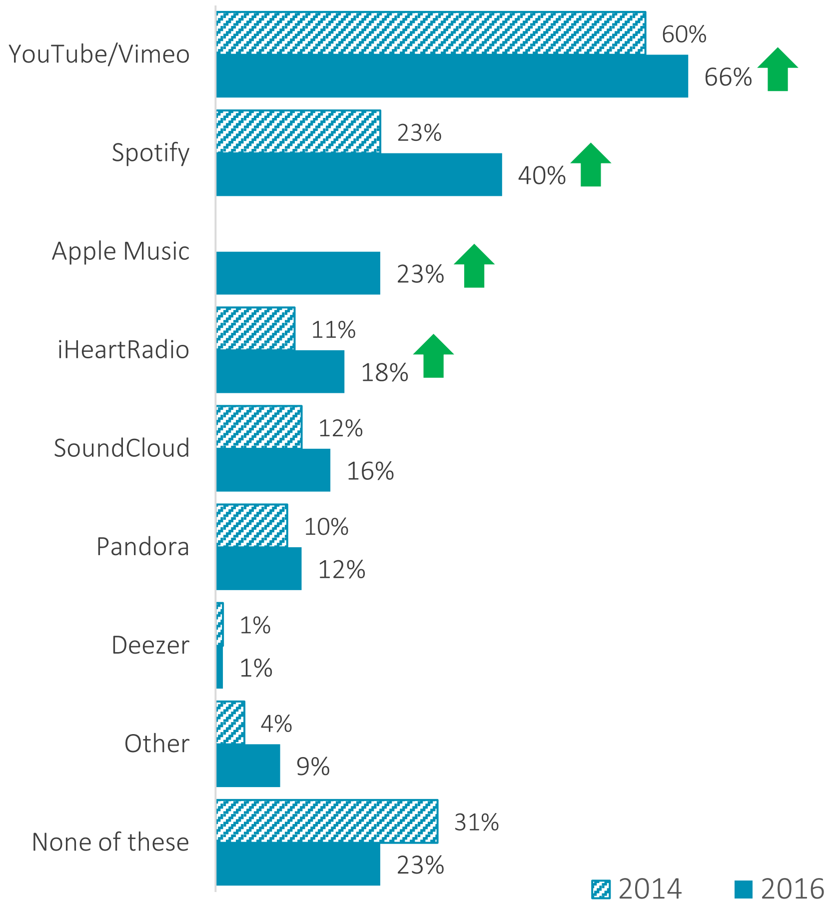
Q13a: In which of the following ways, if any, do you usually find out about new music?

Base: People who use websites to find out about new music: (2014 - n=151; 2016 - n=109)

Indicates significant change at 95% c.i.

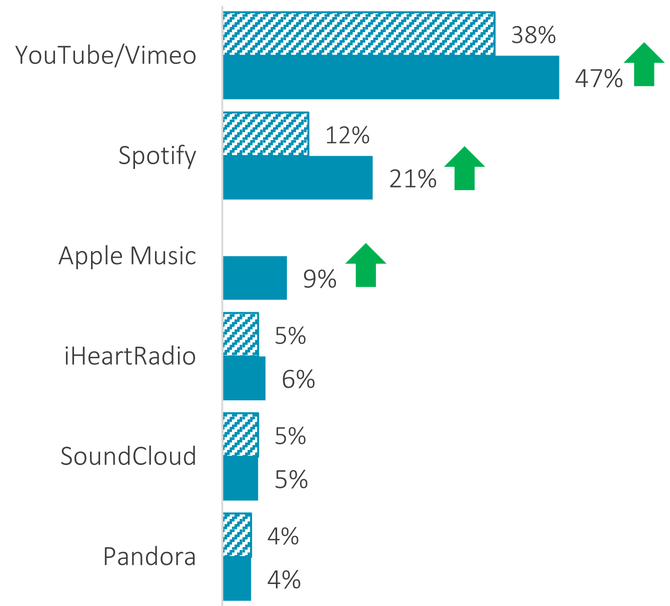
Three quarters of New Zealanders have listened to music online – a slight increase since 2014. Increased use of YouTube, Spotify, iHeartRadio and the relatively new Apple Music has driven this growth.

Ever use to listen to music



Weekly reach

% of all NZers



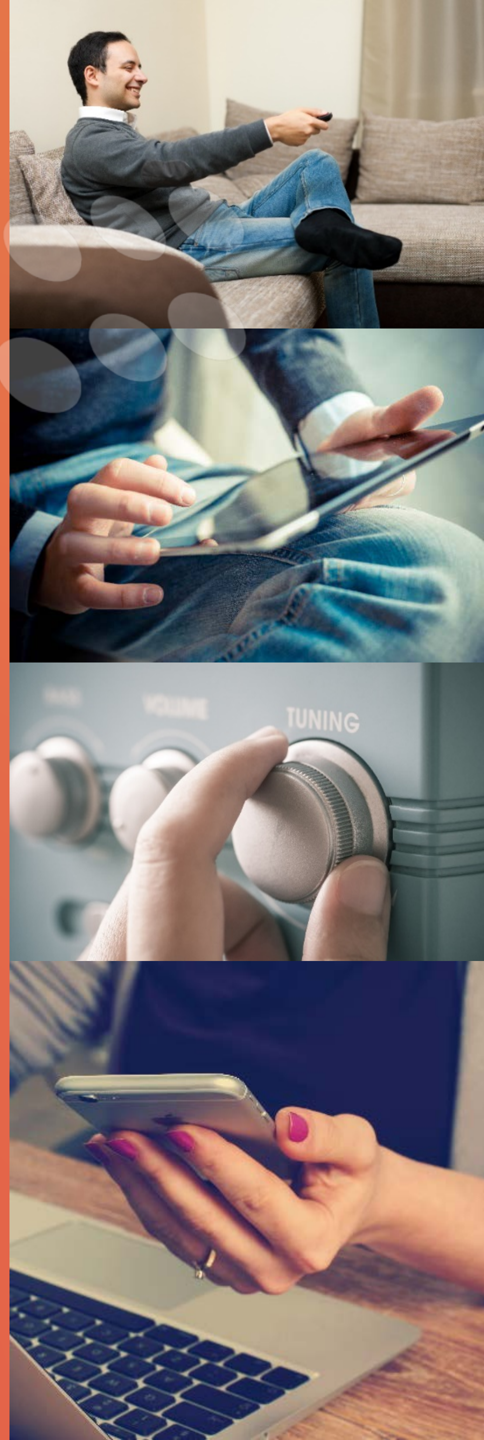
Age is the primary driver of this behaviour:
- Nearly all 15-39s (96%) have listened to music online, compared to 34% of 65+. However this media is now more common among older NZers – in 2014 it was only among 15-24s that showed 97% incidence.

Audience profiles are very similar across the top 4 sites:
- Only Spotify shows a difference with a slight skew towards 15-24s.

Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q13c: Which of the following have you ever listened to music on?; Q13d: About how often do you listen to…?

Indicates significant change at 95% c.i.



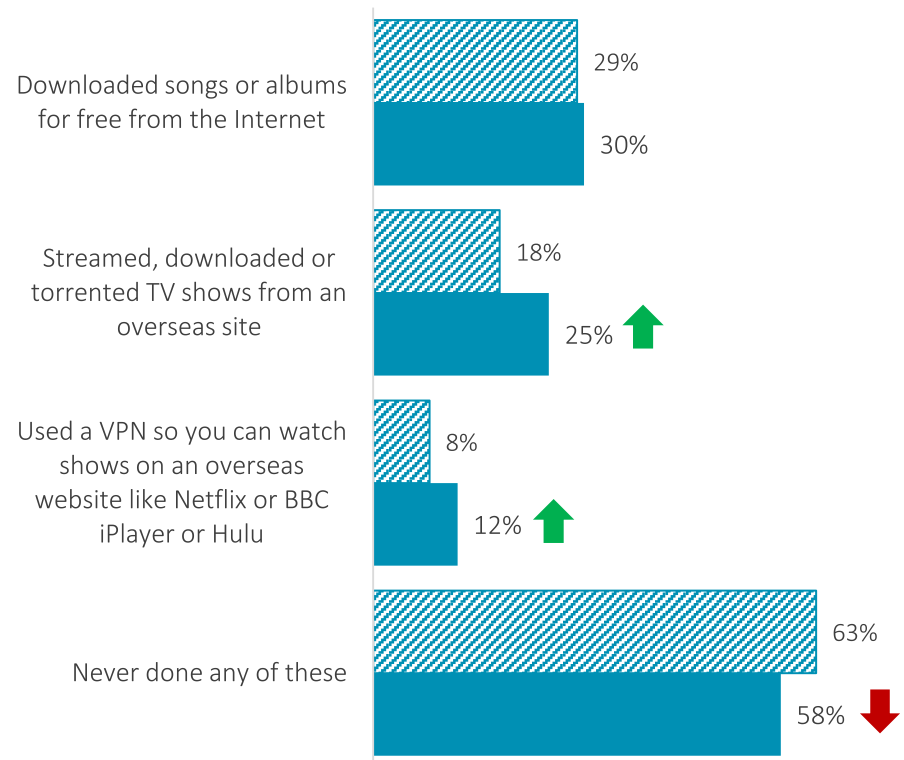
STREAMING, DOWNLOADING AND TORRENTING

Glasshouse | NZ On Air Irirangi Te Motu

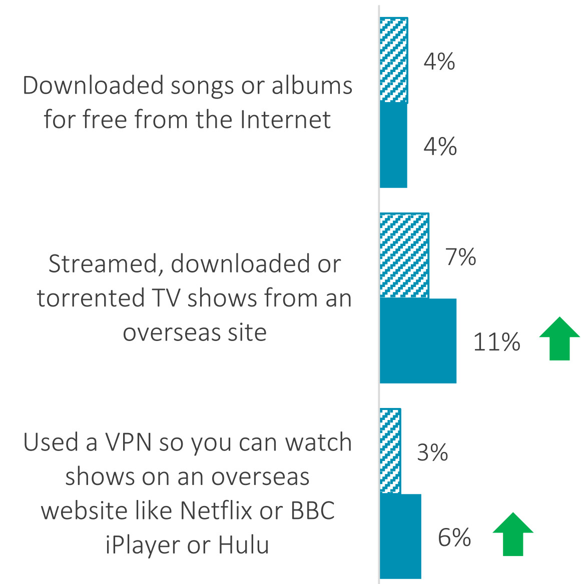
There have been slight increases in the incidence and weekly reach of streaming or downloading TV shows, and using a VPN to watch overseas websites since 2014.
The majority (58%) have not done any of these activities, and just 5% have started since 2014.

% of all NZers

Ever used unauthorised platforms



Weekly reach of unauthorised platforms



2014 2016

Base: All respondents: (2014 - n=,1400; 2016 - n=1,404)

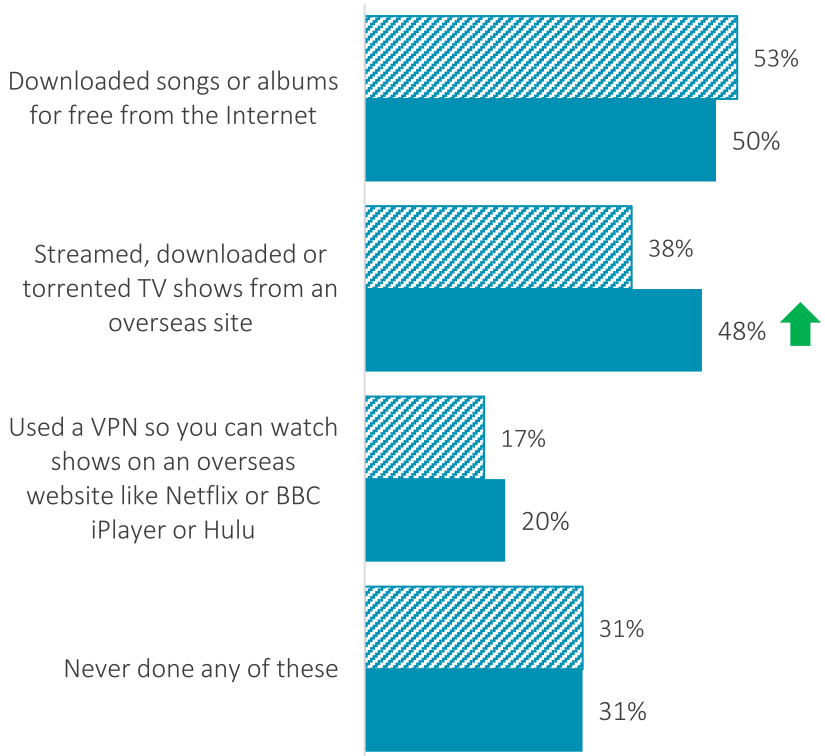
Q10a: Which of the following have you ever done?
Q10b: About how often would you…?

Indicates significant change at 95% c.i.

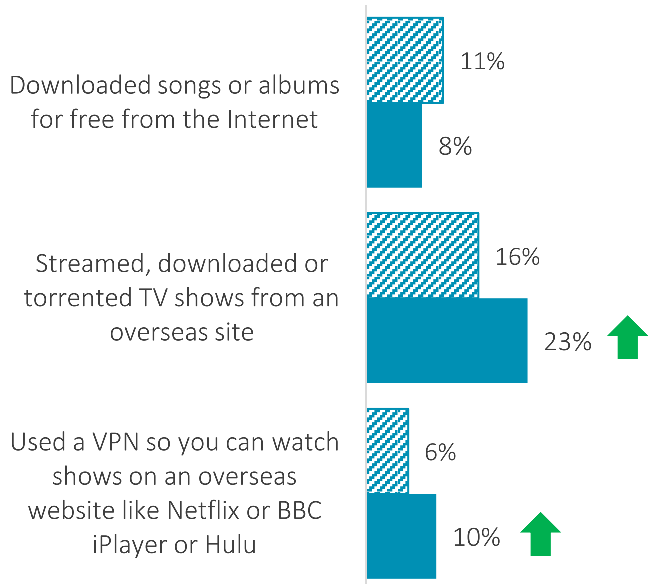
Among 15-34 year olds, there have been slight increases in streaming and downloading TV shows and using VPNs. However these increases have come from existing users as there has been no increase in the proportion who engage with these media overall since 2014.

% of all 15-34 NZers

Ever used unauthorised platforms (15-34s)



Weekly reach of unauthorised platforms (15-34s)

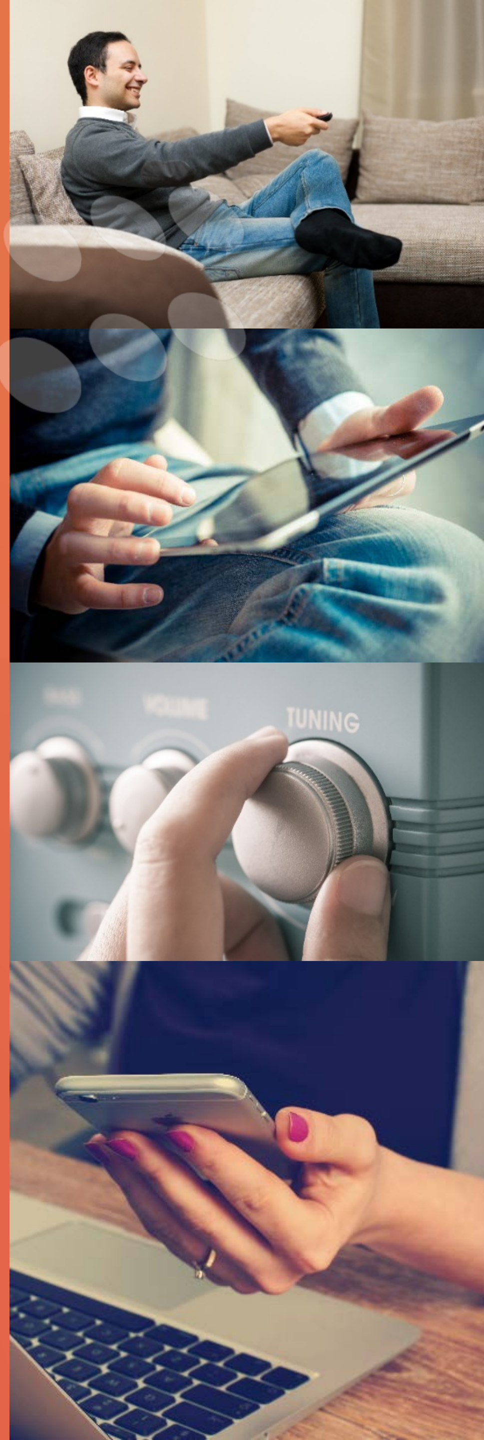


2014 2016

Indicates significant change at 95% c.i.

Base: All 15-34s: (2014 - n=425; 2016 - n=460)

Q10a: Which of the following have you ever done?
Q10b: About how often would you…?



EXTRA ONLINE MATERIAL FOR A TV SHOW

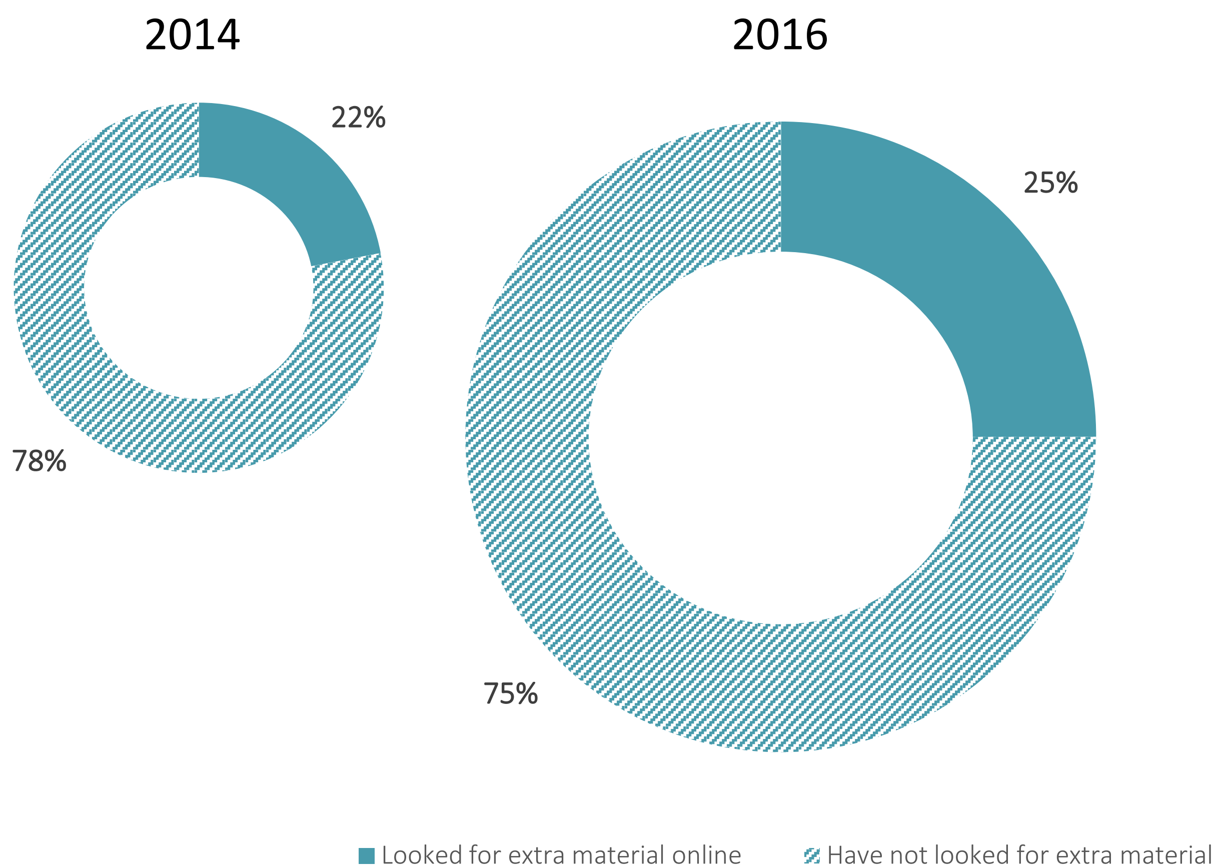
Glasshouse

NZ On Air
Irirangi Te Motu

There has been no significant change in the incidence of New Zealanders looking for extra online material for a TV show since 2014 – one in four have done so. This behaviour continues to be driven by younger New Zealanders.

Ever looked for extra material online

% of all NZers



Age continues to be the main differentiator, though there is a gender difference too:

- Females (28%) are more likely to have looked for extra material compared to males (22%).
- 15-39s (35%) are more likely to have looked for extra material, including;
    - Students (37%)
    - Flatting (34%)
- This compares to just 13% of 55+ year olds.

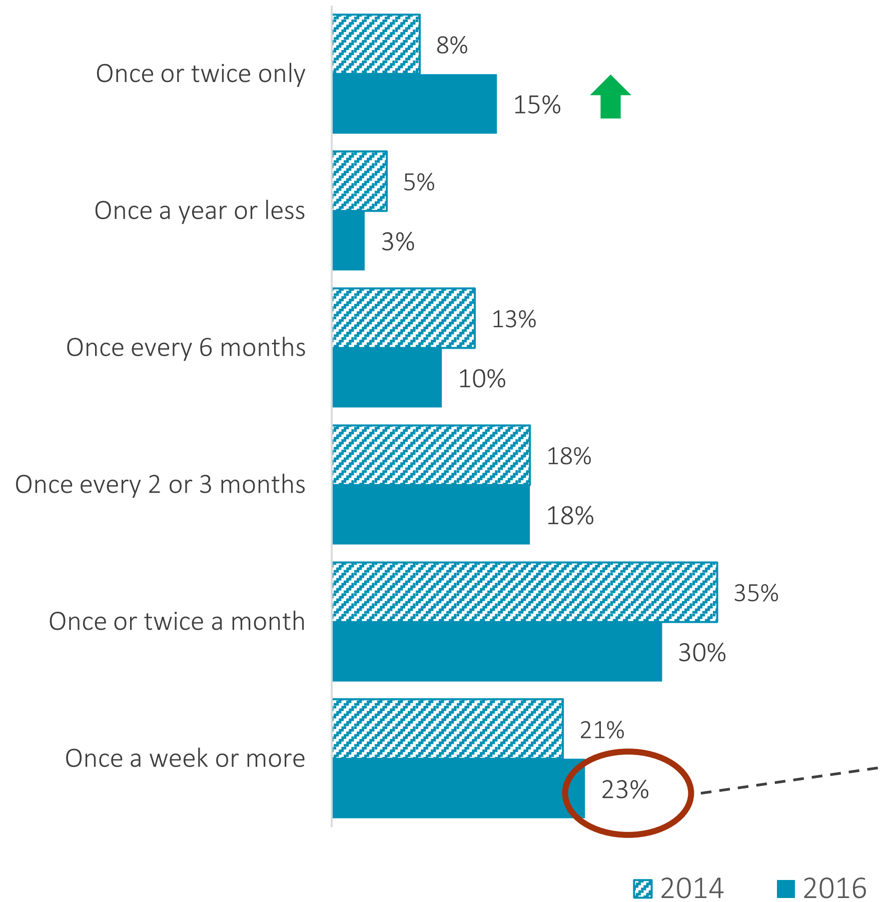
Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

Q9a: Some TV shows have extra material available to watch or read online. This material might include short videos not shown on TV, background to characters in the show, or actors' biographies. Have you ever looked for extra material about a TV show online?

There has been little significant change in frequency or weekly reach of extra online material for TV shows since 2014. Approximately one in two engage with this content once a month or more.

Frequency of looking for extra material online

% of people who have ever looked for extra material



Younger New Zealanders (15-34 year olds) do not engage more frequently with extra online material.

Equates to 6% weekly reach overall. Compared to 5% in 2014.

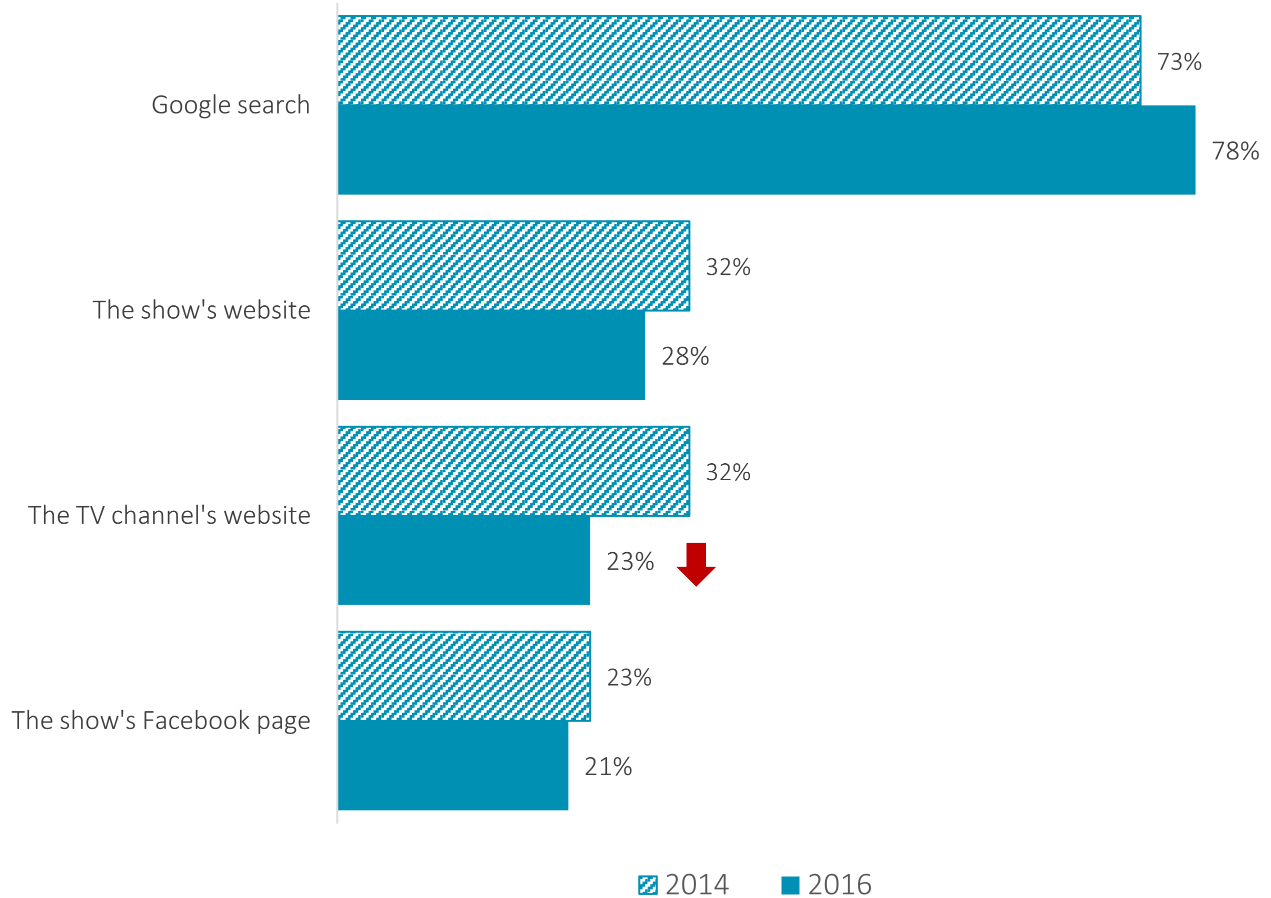
Base: All who have ever looked for extra material (2014 - n=309; 2016 - n=356)
Q9b: About how often would you search for extra material about a TV show?

Indicates significant change at 95% c.i.

Google search continues to be the source of most New Zealanders' extra material. Use of TV channel websites for this content has fallen significantly since 2014.

Source of extra online material

% of people who have ever looked for extra material



Base: All who have ever looked for extra material (2014 - n=309; 2016 - n=356)

Q9c: Which of the following would you use to find extra material about a TV show?

Indicates significant change at 95% c.i.

WEBSERIES

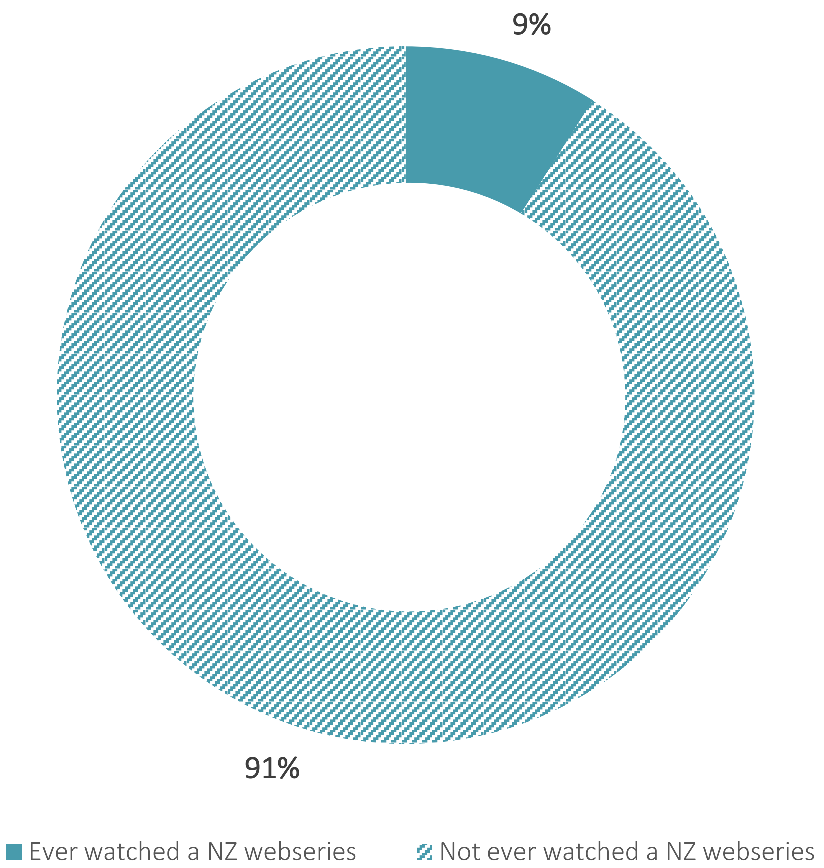
Glasshouse

NZ On Air
Irirangi Te Motu

One in ten New Zealanders have watched at least one episode of a New Zealand made webseries.

Ever watched a NZ webseries

% of all NZers



While age is again the main differentiator, webseries viewers are a slightly older group than other media:

- 25-44 year olds are most likely to have viewed a webseries (16%), compared to just 2% of 55+ year olds.

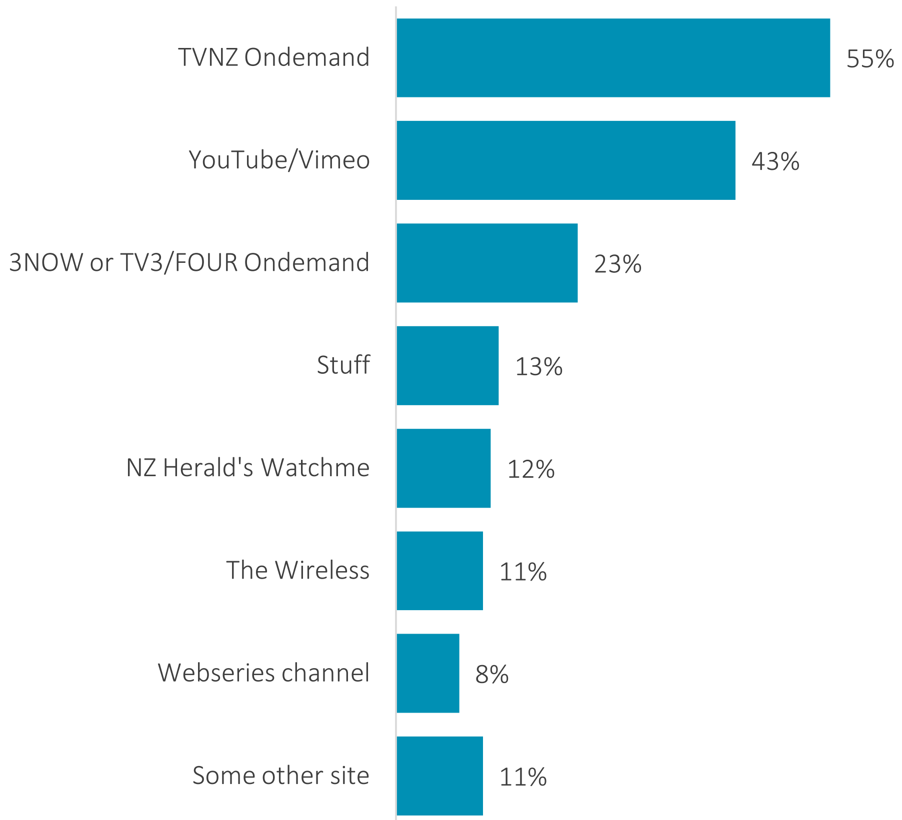
Base: All respondents: (2016 - n=1,404)

Q11a: In recent years there have been some New Zealand made series released online only and not shown on TV. These are called webseries. Have you ever watched at least one episode of an NZ made webseries?

New question in 2016.

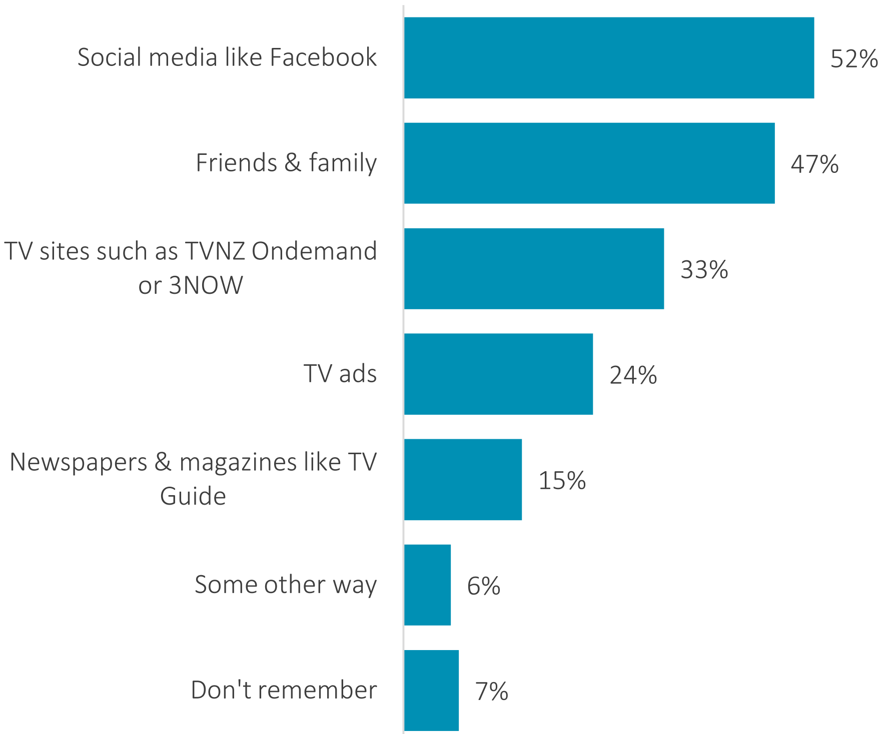
TVNZ Ondemand, followed by YouTube are the most popular sites for viewing webseries. However more New Zealanders find out about NZ webseries through word of mouth including social media and friends & family, rather than NZ Ondemand sites.

Sites used to watch NZ webseries



Sources of information about NZ webseries

% of all webseries viewers

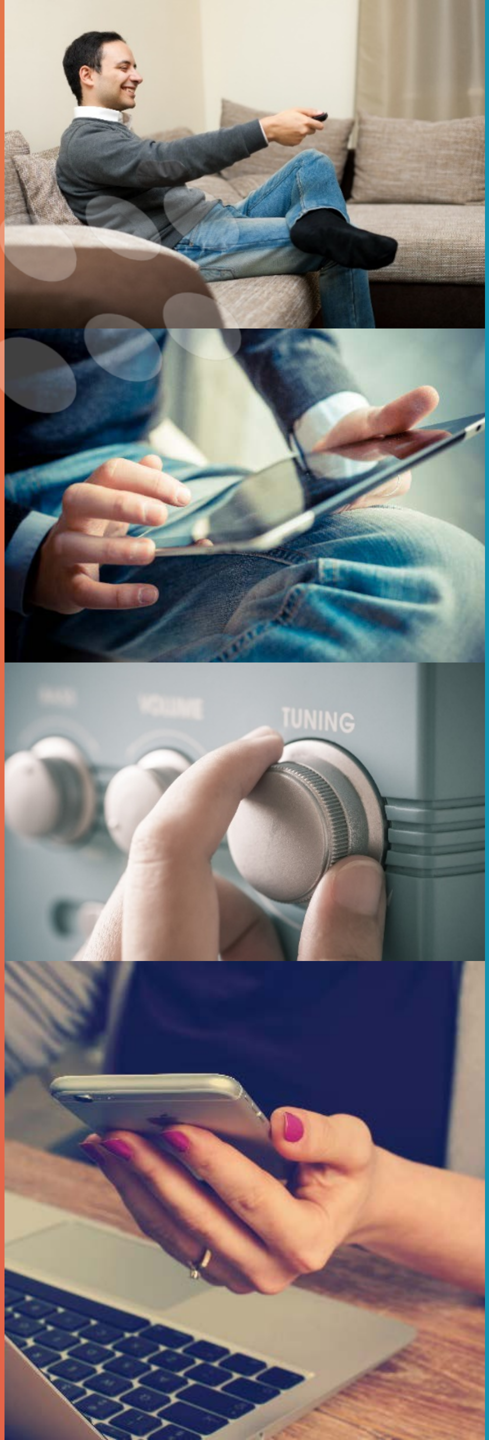


Base: All ever watched NZ webseries: (2016 - n=129)

Q11b: On which of the following sites have you watched an NZ made webseries?

Q11c: In which of the following ways did you hear about these webseries when they screened online?

New questions in 2016.



CAPTIONING AND AUDIO DESCRIPTION

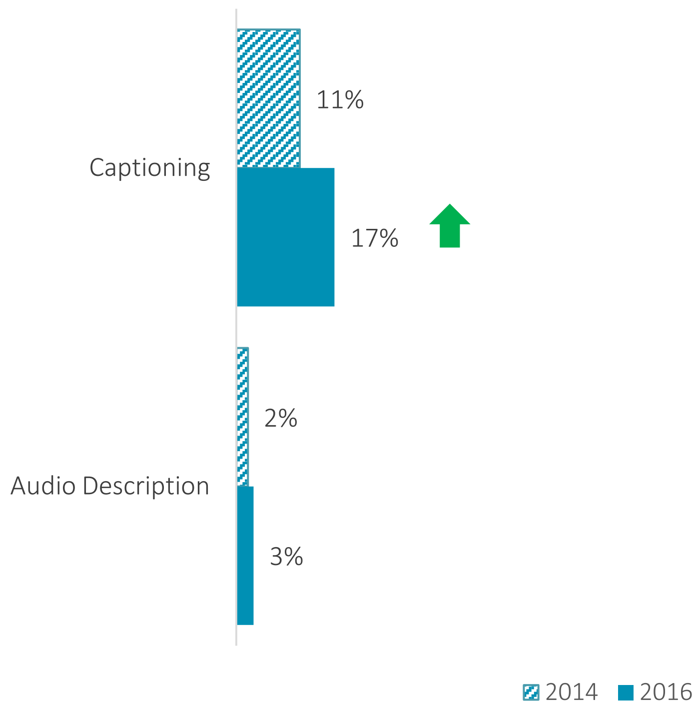
Glasshouse

NZ On Air
Irirangi Te Motu

About one in six New Zealanders ever use captioning and 3% ever use audio description when watching TV. Use of captioning has increased significantly since 2014.

Ever use while watching TV

% of all NZers



There are few significant trends identifying the types of viewers more or less likely to use captioning.

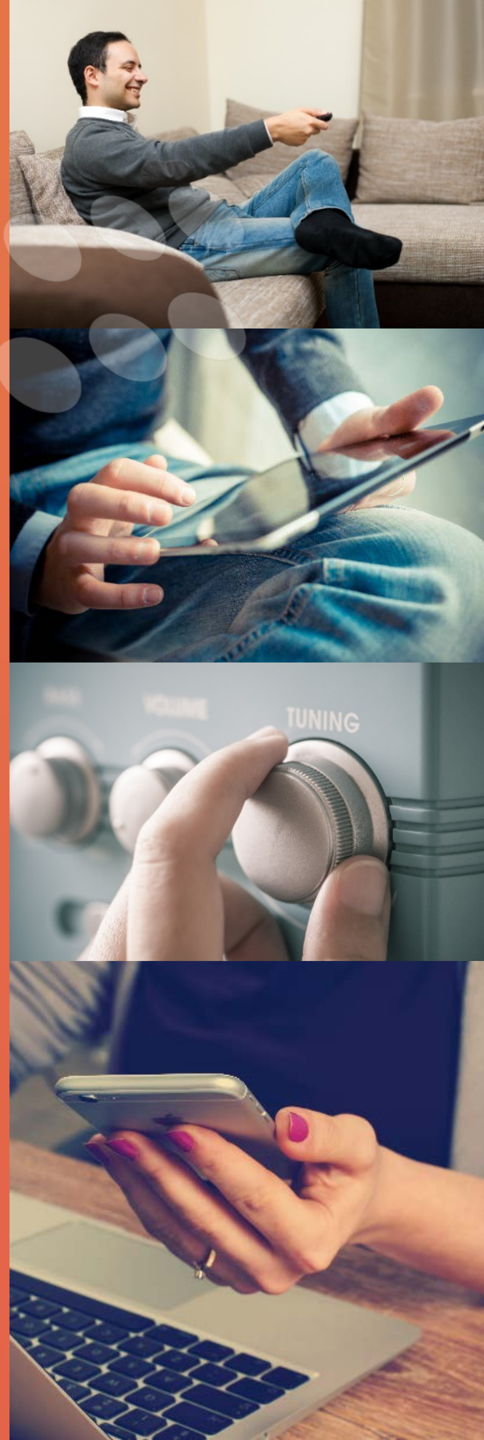
- One exception is that Asian (37%) are more likely to use captioning.

Base: All respondents: (2014 – n=1,400; 2016 - n=1,404)

Q12a: 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.

Q12b: 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.

Indicates significant change at 95% c.i.



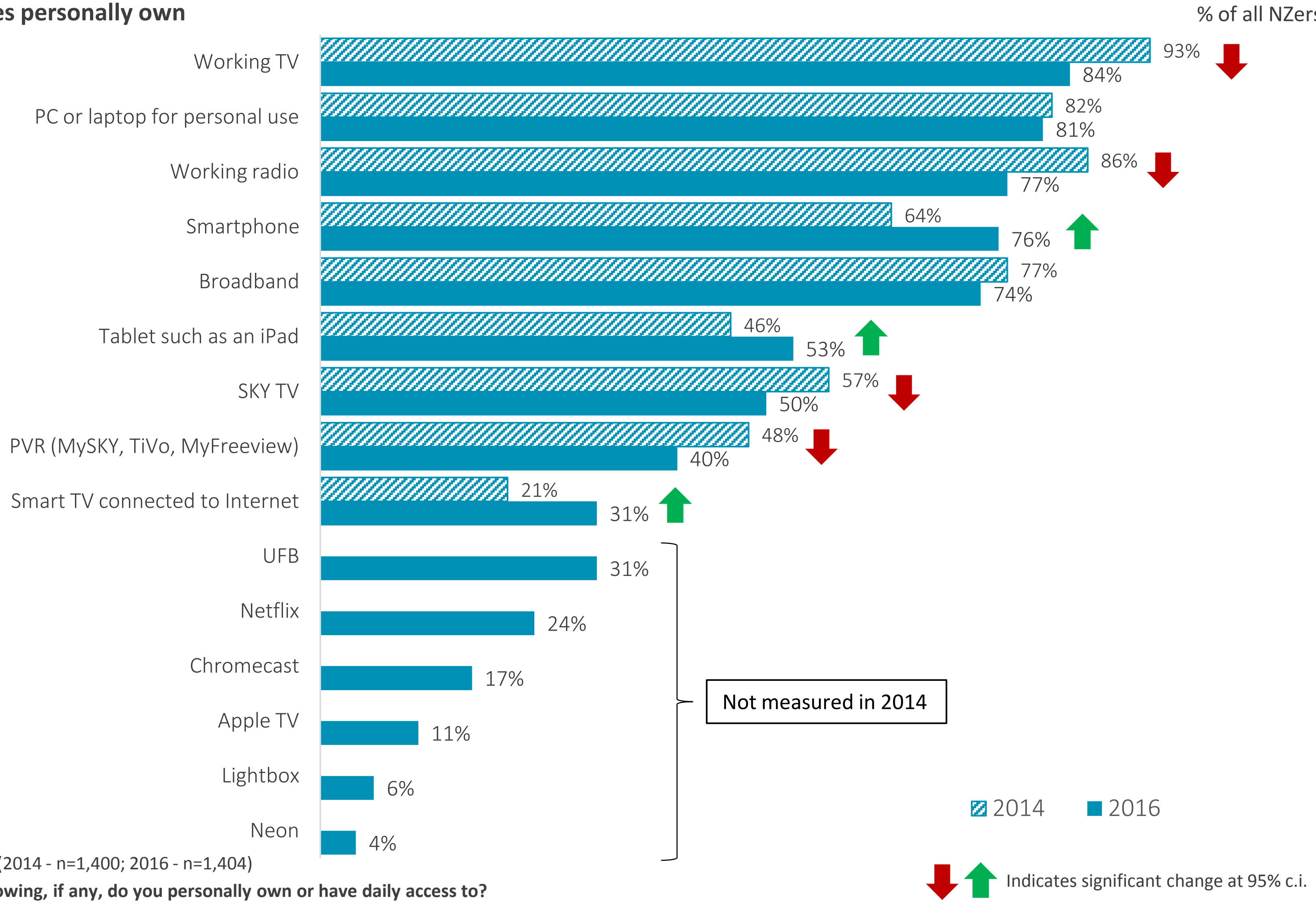
DEVICES PERSONALLY OWN OR HAVE DAILY ACCESS TO

Glasshouse

NZ On Air
Irirangi Te Motu

TVs, radios, and PCs/laptops remain the most common devices, but penetration of TVs, radios, SKY TV and PVRs has fallen, while smartphones, tablets and smart TVs have grown significantly. SVOD services and Chromecast have also launched and quickly established a strong share.

Devices & services personally own or have access to



Base: All respondents: (2014 - n=1,400; 2016 - n=1,404)

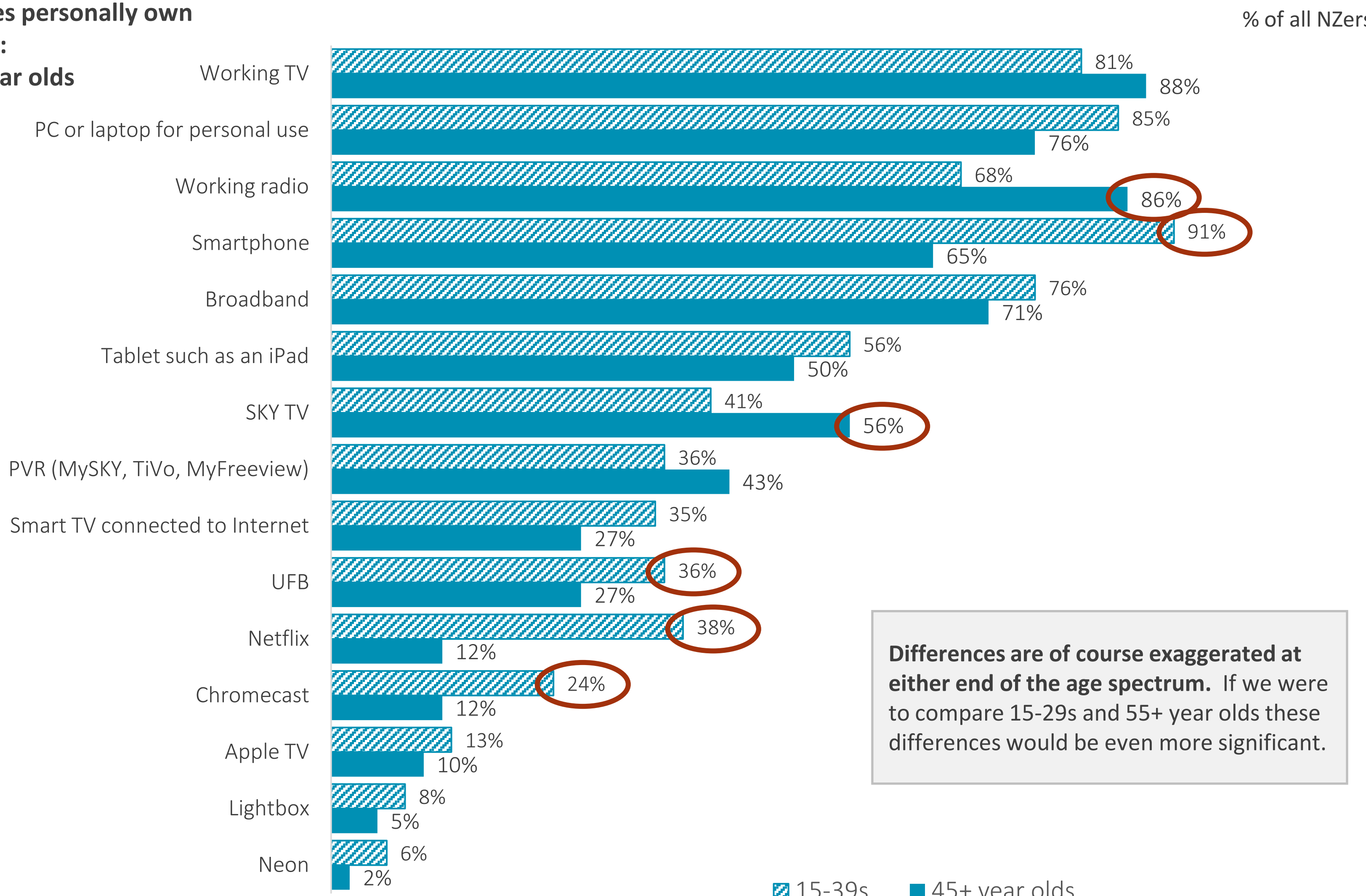
Q14: Which of the following, if any, do you personally own or have daily access to?

There are some large technological divides between different parts of the NZ population, influencing differences in media consumption.

- **The primary differentiator of who is more or less likely to own or have access to different technologies is age and life stage.**
  - The divide between generations in terms of access to technology is not as clear cut as in media consumption because factors such as socio-economic level impact on access.
    - The chart on the next page summarises the differences between under 40 and over 45 year olds to be consistent with the breakdown in daily media consumption summarised earlier in the report.
  - Younger New Zealanders are more likely to own or have daily access to smartphones, tablets, smart TVs connected to the internet, UFB, Netflix, and Chromecast.
  - Older New Zealanders are more likely to own or have daily access to a working TV, radio, SKY TV, and PVR.
- There are also some secondary differentiators:
  - **Socio-economic level** (Ie. disposable income)
    - New Zealanders from higher socio-economic levels are more likely to own or have daily access to; smartphones, tablets, PVR, smart TV connected to the internet, UFB, Netflix, and Chromecast.
  - **Ethnicity**
    - This reflects the difference in Asian consumers' access to technology. This group are more likely to own or have access to smartphones, tablets, smart TV connected to the internet, UFB, Netflix, and Chromecast.
  - **Region**
    - This reflects the differences between Auckland and particularly the South Island. Aucklanders are more likely to own or have daily access to; smartphones, tablets, smart TV connected to the internet, Netflix, and Chromecast.
- Note there are no significant differences between males and females in terms of access to technology.

The impact of the differences in access to technology between younger and older New Zealanders enables the consumption of digital media among younger age groups and limits older age groups to traditional media.

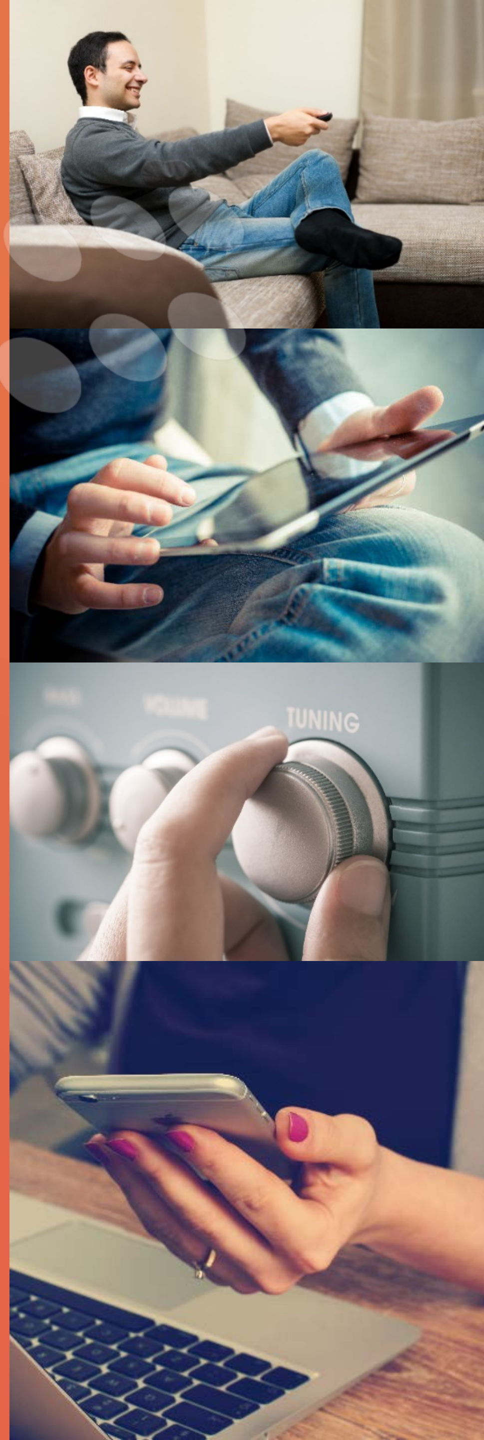
Devices & services personally own or have access to: 15-39s vs. 45+ year olds



Differences are of course exaggerated at either end of the age spectrum. If we were to compare 15-29s and 55+ year olds these differences would be even more significant.

Base: All respondents: (15-39s n=576; 45+ year olds n=707)

Q14: Which of the following, if any, do you personally own or have daily access to?



APPENDIX

Detailed audience profiles

What is the daily profile of consumers of different media?

Significant differences at 95% C.I.

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE

Linear TV
73% daily reach overall
	• 15-39 year olds (63%)
	  • students (65%)
	  • flatting (60%)
	• Double income couples, no kids (59%)
	• Asian (62%)
	• SVOD homes (65%)
	• Netflix homes (64%)
		• 40+ year olds (80%)
		  • 65+ (85%)
		  • retirees (86%)
		  • empty nesters (88%)
		• South Islanders (79%)
		• Sky TV homes (89%)
		• PVR homes (89%)

Ondemand
18% daily reach overall
	• 45+ year olds (11%)
	  • 65+ (7%)
		• 15-29 year olds (27%)
		  • flatting (29%)
		• Lower white collar employees (24%)
		  • $30-$80,000 earners (22%)
		• Families with pre-school or school age children (24%)
		  • 5+ people in home (25%)
		• UFB (24%)
		• Smart TV connected to internet (23%)

NZ SVOD
17% daily reach overall
	• 50+ year olds (5%)
	  • empty nesters (7%)
	  • older, living alone (5%)
		• 15-39 year olds (28%)
		  • 15-29s (30%)
		  • students (29%)
		  • flatting (29%)
		• Double income couples, no kids (24%)
		• High income earners ($120k+ = 25%)
		• Families with pre-school or school age kids (25%)
		  • 4+ people in home (22%)
		• Aucklanders (22%)
		• Asian (25%)
		• UFB (24%)
		• Chromecast (28%)
		• Smart TV connected to internet (23%)
		• **SVOD home (47%)**

What is the daily profile of consumers of different media?

Significant differences at 95% C.I.

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE

Online Video
45% daily reach overall
	• 45+ year olds (22%)
	  • 55+ year olds (16%)
	  • retirees (12%)
	  • empty nesters (19%)
	  • older, living alone (16%)
	• South Islanders (38%)
		• 15-34 year olds (77%)
		  • 15-24s (84%)
		  • students (85%)
		  • lowest income earners (up to $20k = 58%)
		• Double income couples, no kids (62%)
		• Families with pre-school kids (65%)
		  • solo parents (70%)
		  • 4+ people homes (63%)
		• Smartphone (52%)
		• UFB (55%)
		• Smart TV connected to internet (54%)
		• Chromecast (61%)
		• SVOD homes (65%)

Radio
59% daily reach overall
	• 15-24 year olds (45%)
	  • students (36%)
	  • lowest income earners (up to $20k = 46%)
	• 5+ people homes (50%)
		• 45+ year olds (66%)
		  • empty nesters and older singles (65%)
		• High income earners ($80k+ = 69%)
		• South Islanders (66%)
		• SKY TV homes (65%)
		• PVR homes (65%)

Online NZ Radio 7% daily reach overall	• 55+ year olds (4%)	• 30-39 year olds (13%)

What is the daily profile of consumers of different media?

Significant differences at 95% C.I.

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE

Music Streaming
33% daily reach overall
	• 45+ year old s (12%)
	  • retirees (6%)
	  • empty nesters and older singles (9%)
	• South Islanders (26%)
	• SKY TV homes (28%)
		• 15-39 year olds (59%)
		  • 15-24s (72%)
		  • students (75%)
		  • flatting (55%)
		  • lowest income earners (up to $20k = 47%)
		• 4+ people homes (48%)
		• Single and double income couples, no kids (45%)
		• Aucklanders (39%)
		• Asian (52%)
		• Pacific Islanders (66%)
		• Smartphone (38%)
		• UFB (42%)
		• Chromecast (47%)
		• Smart TV connected to internet (39%)
		• SVOD homes (51%)

Music on CDs/iPod
27% daily reach overall
	• 60+ year olds (14%)
	  • retirees (15%)
	  • empty nesters and older singles (17%)
		• 15-24s (46%)
		  • students (45%)
		  • flatting (46%)
		• 4+ people homes (34%)

As with media consumption overall, the 2016 audience profiles of the main FTA channels are most strongly differentiated by age/life stage.

Significant differences at 95% C.I.

TV ONE (40% overall)

LESS LIKELY TO WATCH

- 15-34s (20%)
  - students (17%)
  - flatting (28%)
- Double income couples, no kids (23%)
- Aucklanders (31%)
- Asian (22%)
- Pacific Island (26%)
- SVOD homes (29%)

MORE LIKELY TO WATCH

- 40+ (53%)
  - 65+ (64%)
  - retirees (63%)
  - empty nesters and older singles (60%)
- South Islanders (49%)
- SKY TV homes (47%)

TV3 (31% overall)

LESS LIKELY TO WATCH

No groups are significantly less likely to watch TV3.
TV3 has the broadest appeal of the main FTA channels

MORE LIKELY TO WATCH

- 40-54s (37%)
- Mid-high income earners (35%)
- PVR homes (37%)

TV2 (22% overall)

LESS LIKELY TO WATCH

- Males (18%)
- 55+ year olds (12%)
  - retirees (11%)
  - empty nesters and older couples (13%)
- Higher income earners ($80k+ = 17%)

MORE LIKELY TO WATCH

- Females (25%)
- 15-29s (33%)
  - students (32%)
- Families with pre-school and school age children (30%)
  - 3+ people homes (27%)
- Māori (31%)
- Pacific Island (35%)

PRIME (12% overall)

LESS LIKELY TO WATCH

- Students (4%)
- 4+ people homes (8%)

MORE LIKELY TO WATCH

- 60+ (17%)
  - retirees (21%)

Consumption of unauthorised media continues to be driven by younger New Zealanders (15-34s) and males. These key groups have not changed since 2014.

Significant differences at 95% C.I.

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE

Download songs or albums for free
 	
30% ever done overall
	• Females (27%)
	• 45+ year olds (14%)
	  • retirees (8%)
	  • empty nesters & older singles (11%)
		• Males (33%)
		• 15-34 year olds (77%)
		  • students (60%)
		  • lowest income earners (up to $20k = 42%)
		  • flatters (58%)
		• Single & double income couples, no kids (46%)
		• 3+ people homes (38%)
		• Asian (40%)

Stream, torrent, or download TV shows
 	
25% ever done overall
	• Females (21%)
	• 45+ year olds (9%)
	  • retirees (3%)
	  • empty nesters & older singles (7%)
		• Males (29%)
		• 15-34 year olds (48%)
		  • students (49%)
		• Double income couples, no kids (50%)
		• 3+ people homes (31%)
		• Asian (35%)

Use VPN to watch shows on an overseas website
 	
12% ever done overall
	• 55+ year olds (3%)
	  • retirees (2%)
	  • empty nesters & older singles (3%)
	• South Islanders (8%)
		• 25-34 year olds (22%)
		  • students (19%)
		  • flatters (28%)
		• Double income couples, no kids (29%)
		• Aucklanders (16%)

What is the profile of users of key technology?

Significant differences at 95% C.I.

MEDIA	LESS LIKELY TOOWN?ACCES	MORE LIKELY TO OWN/ACCESS

Working TV
84% overall
	• 25-44s (78%)
	  • students (77%)
	  • flatting (70%)
	• Single & double income couples, no kids (72%)
	• Lowest income earners (up to $20k = 80%)
	• Highest income earners ($120k+ = 76%)
	• Asian (73%)
	• Pacific Island (73%)
		• 65+ year olds (92%)
		  • retirees (91%)
		  • empty nesters & older singles (89%)
		• Families with kids aged 5 and over (89%)

Radio
77% overall
	• 25-44s (65%)
	  • students (63%)
	  • flatting (51%)
	• Single & double income couples, no kids (63%)
	• Asian (60%)
	• Pacific Island (60%)
		• 45+ year olds (86%)
		  • retirees (88%)
		  • empty nesters & older singles (87%)
		  • single person homes (83%)

SKY TV
50% overall
	• 25-39 year olds (36%)
	  • flatting (35%)
	• Lowest income earners (up to $20k = 41%)
	• Single & double income young couples, no kids (31%)
	• Asian (33%)
		• 50+ year olds (59%)
		  • empty nesters (64%)
		• South Islanders (55%)

PVR
40%
	• 15-24s (33%)
	  • flatting (26%)
	• Single & double income young couples, no kids (34%)
	• Single person homes (29%)
	• Asian (33%)
		• 40-64 year olds (47%)
		  • empty nesters (46%)
		• Mid-high income earners ($50k+ = 47%)
		• Families with school age or older kids (45%)
		• Māori (48%)
		• Pacific Island (46%)

What is the profile of users of key technology?

Significant differences at 95% C.I.

MEDIA	LESS LIKELY TOOWN?ACCES	MORE LIKELY TO OWN/ACCESS

Smartphone
76% overall
	• 65+ year olds (45%)
	  • retirees (45%)
	  • empty nesters & older singles (56%)
	  • single person homes (53%)
	• South Islanders (70%)
		• 15-39 year olds (91%)
		  • students (88%)
		• Double income young couples, no kids (93%)
		• Employed (83%)
		• Mid-high income earners ($50k+ = 85%)
		• 3+ person homes (86%)
		• Aucklanders (82%)
		• Asian (87%)

Tablet
53% overall
	• 15-24s (46%)
	  • flatting (31%)
	• 60+ year olds (41%)
	  • retirees (39%)
	  • empty nesters & older singles (43%)
	  • single person homes (36%)
	• South Islanders (49%)
		• 30-49 year olds (66%)
		• Families of all types (64%)
		  • 4+ person homes (62%)
		• White collar employees (60%)
		• High income earners ($80k+ = 66%)
		• Aucklanders (58%)
		• Asian (63%)

Smart TV connected to internet
31% overall
	• 60+ year olds (19%)
	  • retirees (17%)
	  • older singles (18%)
	  • single person homes (20%)
	• Low income earners (up to $30k = 22%)
	• Flatting (16%)
		• 30-54 year olds (40%)
		• Upper white collar employees (38%)
		• Mid-high income earners ($50k+ = 41%)
		• Single & double income young couples, no kids (41%)
		• Families of all types (37%)
		  • 5+ person homes (41%)
		• Asian (48%)

What is the profile of users of key technology?

Significant differences at 95% C.I.

MEDIA	LESS LIKELY TOOWN?ACCES	MORE LIKELY TO OWN/ACCESS

UFB
31% overall
	• 65+ year olds (20%)
	  • retirees (18%)
	  • empty nesters & older singles (22%)
		• 15-29 year olds (42%)
		  • students (38%)
		• White collar employees (36%)
		• High income earners ($120k+ = 40%)
		• Families with school age or older kids (38%)
		  • 3+ person homes (37%)
		• Asian (37%)

Netflix
24% overall
	• 50+ (10%)
	  • retirees (6%)
	  • empty nesters & older singles (10%)
	  • single person homes (8%)
	• South Islanders (19%)
		• 15-39s (38%)
		  • students (49%)
		  • flatting (38%)
		  • 5+ person homes (35%)
		• Double income young couples, no kids (48%)
		• High income earners ($80k+ = 34%)
		• Aucklanders (31%)

Chromecast
17% overall
	• 55+ year olds (9%)
	  • retirees (6%)
	  • empty nesters & older singles (9%)
	  • single person homes (6%)
	• South Islanders (14%)
		• 15-39s (24%)
		  • students (25%)
		  • 5+ person homes (22%)
		• Upper white collar employees (23%)
		• Mid-high income earners ($50k+ = 23%)
		• Single & double income young couples, no kids (32%)
		• Aucklanders (21%)
		• Asian (25%)