



# HEIHEI User Research 2020

Opportunities for refining a strong content  
offering to increase usage and engagement  
among 5-9 years olds



Background, Objectives & Approach

Summary of Learnings

Context, Usage and Behaviours

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Opportunities

A quick look at Gaming

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Performance Q1 & Q2 FY20



# **Background, Objectives and Approach**

# Background & Objectives

**HEIHEI is a TVNZ/NZOA partnership.**

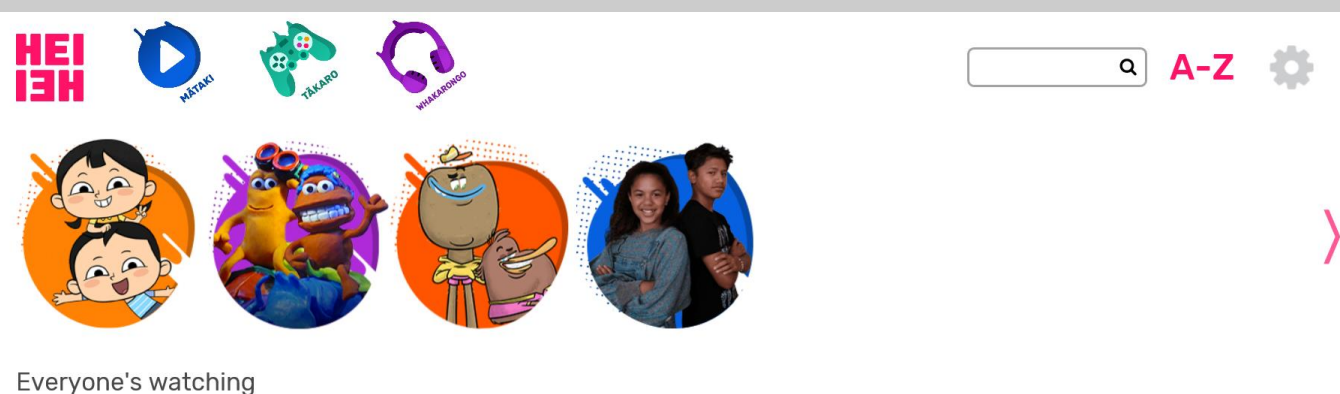
**Currently a stand-alone platform, HEIHEI will move to OD in 2020.**

An initial user research study was done for HEIHEI in August 2018 (after approx. 2-3 month of being live); with a focus on UI.

Fresh research is required to update the content focus for future funding rounds and inform an RFP for HEIHEI in March 2020 (Focus on demo 5-9 years of age).

With the focus on the HEIHEI content offering in an increasingly competitive streaming market, objectives of the 2020 user research study were to:

- Identify hallmarks of a strong content offering for “Kiwi kids”
- Identify opportunities for increasing usage and engagement



# Themes & Topics



Perceptions

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Relevance

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Local Content

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Behaviour and Usage



# Research Approach

## 5 Focus Groups\*

- February 2020 in Auckland (3) and Rotorua (2)
- Children aged 5-9, in 2 age streams
- Multiple platform users across HEIHEI and competitors
- All heavy users of online video and games

\* Group 1 Auckland mixed, older skew, children of TVNZ staff

## Participant Overview:

**24 kids** : In-group discussion (60-90 minutes)  
Submission of 'pre-task' (with caregiver)



10

5-7 years



5

Boys



5

Girls



14

7-9 years



8

Boys



6

Girls

Mix of:

Ethnicity

Income

Households



# Summary of Learnings

# Summary of Learnings



HEIHEI enjoys overall positive perceptions among children and care givers, however awareness is limited. Negative views are driven largely by a sense that content is juvenile, and the platform second rate - bad user experiences can erode likelihood to return or recommend.

Content offering on HEIHEI currently has relevance, covering the popular core genres reported in the children's VOD viewing behaviours overall.

Curation does resonate, however evidence of use limited among children. Caregivers may be more likely to use curation structure to assist selection, but children seem to rely on visual cues (tiles) first and typically scroll on the horizontal belt, top down, without noticing headers.

Local content is appreciated and enjoyed. Children like seeing other kiwi kids doing 'cool stuff'; but local content does need to deliver to international competitive set on the themed belt.

Brand new and local shows have to work harder to establish a strong identity and purpose with a strong name and visual that can captivate on sight i.e. on the 'tile'.

There was an absence of reports of specifically seeking out local content (A pleasant but typically accidental find when scrolling down to find it under specific header). Generally children notice / find it along other belts.



# Summary of Learnings

This age group like to feel stimulated, challenged and learn things as they have fun and get entertained (true for games and shows); humour is key and there is no 'overt' resistance to 'learning' along the way from video, but are savvy to 'teaching'. HEIHEI content and Games can fall a bit short for older stream who report a lack of 'new' learning (shows) or challenge (games).

A compelling offer MUST encompass: Cartoons, Kids Factual, Live Scripted and Family Factual . Seeing cool, slightly older children doing interesting, clever things and ANY content about animals are favourites.

**Key offer opportunities for 5-7 age group:** Fun, cute and varied cartoons, age appropriate entertaining learning (complimenting their formal learning journey), mixed formats in one show, mild peril.

**Key offer opportunities for 7+ age group:** Fresh Live Scripted content, bigger and more risky/adventurous factual content and non-typical learning, a challenge, aspiration, the wild and exotic, the extreme, outrageous and a bit risqué... (scary, danger).

Engagement and loyalty could be bolstered by expanding high performers into sub brands and spin offs, movie shorts etc, and developing cross platform opportunities to build more touchpoints to form a relationship and drive preference.





# **Context, Usage and Behaviour**

# THE 5-9 YEAR OLD AUDIENCE ...

still 'kids' but in a different world

Usage and Behaviour Context

OPTIONS

OPPORTUNITIES

OCCASSIONS

ACCESS

NAVIGATION AND  
CURATION

DISCOVERY AND  
SELECTION

Curious

Sophisticated and Critical

Rapidly Acquiring knowledge and skill

Can have short attention span

*'Time Poor'*

Prone to heuristics, habits and approval seeking (...*just like everyone else!*)

"I look at the pictures. If I like a picture enough I will click on it" "I will usually give it a try... like one episode maybe"

"Usually I will forward through to see what its like" "If I click on something and I can look to see if it is like something else I like or hate or know in the pictures they recommend before I watch"



M, 8 years, Auckland

# Platforms have strengths and content type and occasion can be a driver of preference

					
PERCEPTION	Easy Variety	Everyone's favourites! Known Recognisable	NZ content (Unique) No Ads! Babyish Boring Too Easy	Like TV	Limitless
PROS AND CONS	Good for Everything! Finding Kid and Family Factual. Notifications	Good for Family movies Range New Shows Lots of Scripted Shows – great humour and cool names!	<b>Good for</b> passing time on your own or sharing with a sibling (especially younger) – games or video Easy to get around Te Reo Maori Content  Not that much stuff	<b>Good for</b> lots of stuff Catch up if you missed a show 'Discovering' Watching varied content with family	Best for gaming, vloggers and special interest content Quite individual, immersive and indulgent – great video will be shared ('cool finds')
CORE DRIVERS	Really cool. Something for everyone. Never boring.  Viewing along or with Family, Siblings, Friends.	Well-known. Parents endorse / trust; free choice. Lots of time or little time to watch – you can find something.	Quite a cool variety Left alone	On the TV Easy	Can be inappropriate (but this drives some of the appeal when older), Aspirational – making and sharing own content is the ideal!
“	<i>“Because it has the most shows” “I can watch Gumball, Pokémon, Sonic. I can watch by myself and I watch Transformers with my dad. “It makes me feel happy” F, 6, Auckland</i>	<i>“High School Musical. I love music and they are cool and funny. And we watch family movies too.” F, 9, Auckland</i>	<i>“I like HEI HEI. There are interesting new shows I haven't seen before. In some ways I don't like that they don't have shows I know. And some (Shows) are for babies” F, 6, Auckland</i>	<i>“Like if I miss ‘what now’ I can just catch up.” ... “I don't watch it on HEI HEI”... “I watch what now on catch up from the beginning to the end. I watch the whole show” M, 8, Rotorua</i>	<i>“I can watch other people doing really cool things and playing cool games” ... “I feel happy, interested, inspired.” “It shows me things that I would like to be able to do as well that are really extreme” M, 9, Auckland</i>

# Platforms have strengths and content type and occasion can be a driver of preference

	NETFLIX	Disney+	HEI HEI	Like TV	YouTube
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# Within this context; HEIHEI straddles different tensions for children and caregivers alike – both real and perceived



“Safe”

New Content

Free, Easy Platform



Pre-School Content

Unknown Content

Disappointing UX

## Sources of Awareness (Children)

- ‘TV Ads’
- Parents download it
- Teacher / School
- Advocates of indigenous content - Kura Kaupapa



*I did see the ads on the TV. It plays on the TV often. But I didn't go until my mom got it*

**M, 9 years, Auckland**

*I thought HEIHEI looked good. I heard about it from a mum-friend. {Daughter}'s had the app for a year now. Surprised my child doesn't use it more often. There's just not stuff to hold her attention"*

**Caregiver, Older Stream, Auckland**

*"It's good but its not my favourite. I go on there only when I am bored. Like of everything else" ... "I don't go on often. Like sometimes. I think it is just because I have the app on my I pad"*

**F, 7 years, Auckland**





*"I like HEIHEI. It has got Transformers on it. I think I will play some games on it one day if it works"*

**M, 6 years, Rotorua**

*"HEIHEI Doesn't have enough games. And some are babyish"*

**F, 6 years, Rotorua**

*"There's nothing I don't like so far (About HEIHEI) unless they're baby shows. My sister watches the baby shows. Like Pipi Ma"*

**F, 6 years, Auckland**

*"There's lots of videos I can see that I think I like. I like the way they put the videos"*

**F, 5 years, Rotorua**



*"HEIHEI is good because there are lots of funny shows. Shows you stuff you can do in your free time. I like seeing if the experiments work"*

*"I don't like the subtitles (I couldn't get them off the TV when casting). Some shows are too babyish. Some shows are too short for me. Like George and Me. Some of the topics are boring, I have already learned about some of them"*

**F, 9 years, Auckland**

*"I think it is good. **If you don't have Netflix, or Disney+** then you can get onto HEIHEI"*

**F, 9 years, Auckland**

*"They have some good animation. Some are New Zealand based"*

**M, 9 years, Auckland**



## 5-7 Year Olds

*"Some of the shows on there she doesn't watch any more as they are too babyish for her."*

*"HEIHEI is okay, but maybe its actually for a younger audience? The majority of content seems for younger. A lot seems like it will be better for under 5's."*

**Caregiver, Auckland**

*"It is a very cool app. For children as it doesn't contain any AO things like YouTube. If my son is on HEIHEI I don't worry about what he is watching or playing"*


**Caregiver, Auckland**

## 7-9 Year Olds

*"It's good to know it is there and has something educational to it. I noticed he loved the science experiments type stuff. He likes to see how things work. I think it is easy to use. Seems to be a lot of NZ content which I like. Can cast to TV which is good too. But then the app kept crashing, freezing & had to keep being restarted which was frustrating"*

**Caregiver, Auckland**

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**Video**

**STREAMING  
VIDEO  
REPERTOIRE  
FEATURES  
CORE  
SIMILARITIES  
ACROSS THE AGE  
RANGE**  
(OVERALL FAVOURED;  
5-9 YEARS)

## *Cartoons*

"It is action and anything can happen. Like talking dragons. It is fun to watch. And you can learn stuff"  
..."Like practice my Maori" **M, 6, Rotorua**

## *Vloggers*

"I like gaming videos because they are fun to watch. And they help me learn new stuff for my games – Minecraft and Roblox" **M, 5, Rotorua**

## *Kids Factual*

"I like watching 'What's your problem' and seeing if it will work" ... "I like seeing the kids"  
**F, 8, Auckland**

## *Live Scripted*

"I feel involved. I feel happy and calm. Sometimes confused and scared. I like them. **F, 9, Auckland**

## *Family Factual*

"They are called documentaries. Like Animal Planet. You learn about animals and how to take care of the planet" **F, 8, Auckland**

## *Animals and Other Kids*

"No matter what I'm doing – if I see animals I just click!" **F, 8, Auckland**



## Younger Kids Say... VIDEO

*"I like to watch Kia Mau.  
Because I like Kapahaka. Then I  
can practice"*

**F, 5 years, Rotorua**

*"I really love dogs. Like Animal  
Tube. Any thing about animals. I  
really love animals"*

**M, 7 years, Auckland**

*"I like Peppa Pig. Its funny"*

**M, 5 years, Auckland**

*"Robotrains on Netflix. They  
transform into robots and trains.  
They have different powers. They  
kind of fight. They have cool  
moves."*

**M, 7 years, Auckland**



## Older Kids Say... VIDEO

*"It's nice to see Kiwi shows like Jandal Burn. It's funny. I liked the kiwi and the rockhead guy"*

*"But most of the shows got boring"*

**F, 8 years, Auckland**

*"Young Ocean Explorers was good. I like the outdoors. I like this show because my cousin Tiki is on it and it's New Zealand and I love diving"*

**M, 9 years, Rotorua**

*"The Feijoa Club. It looked like it might be interesting with kids in it and then I liked it because it was cool because it has people from New Zealand on it."*

**F, 8 years, Rotorua**

*"Action. Fun. I love battles. No more Mickey Mouse cartoons"*

**M, 8 years, Auckland**



### 5-7 Year Olds

*"He has always loved animated shows, and now he is also more into action. Anime he is becoming more interested in. Although he is becoming interested in other types of shows now too. He loves 'Walk the Prank' which is a kids pranking show"*

**Caregiver, Auckland**

*"HEIHEI is okay for some kids. I'm just not sure if {SON} liked it enough to come back – he has 3 older brothers. So he is exposed to older games and shows."*

**Caregiver, Auckland**

### 7-9 Year Olds

*"I learnt that my son prefers to watch real life shows as opposed to cartoons now. He is very into hunting and animals. I think there is some stuff on HEIHEI but it is generally suited for a younger age groups than 9. Maybe up to 8?"*

**Caregiver, Rotorua**





**Opportunity**

# Opportunities for a Strong Content Offer...

- Should build on current HEIHEI staples and successes with some new content streams, and considered tone and content nuancing by age stream
  - Could expand to include more Factual (in particular Family) and Live Scripted
    - MUST entertain!

## 5-7 Year Olds

Fun, cute and varied

Age appropriate learning (complimenting growing literacy etc) that allows mastery. Can be replicated...

Mixed formats in one show, mild peril, relatable older kids

*Cartoons* Nuance

*Live Scripted*

*Kids Factual*

Build on Current and Expand

*Family Factual* Develop

*Animals and Other Kids*

## 7-9 Year Olds

A little bit more!  
More outrageous, extreme, ridiculous, risky..

Well developed characters, relatable and aspirational twists, plots and surprises... unlikely scenarios

Unusual factual content and learning, a challenge, aspiration, the wild and exotic, the extreme – a bit dangerous?

- Unlikely to be replicated
- Unlikely to ever see



# **A quick look at Gaming**

# HEIHEI games present less challenge for over 7 year olds, but provide enjoyable content with kiwi touches which are appreciated; game and video cross over is beneficial to both

## 5-7 Year Olds

**Apps** = best for ease of access and use, familiarity and navigation

*Adult as custodian of device, gatekeeper of Apps and Downloads, facilitator of online search...*



*"Maia. Because she is a super hero and I like her. I like the game because we get to follow her dog"*

**F, 5, Rotorua**

*"I chose {Flying Kiwi} because it had a kiwi. It is good. Fun. And it is a bit challenging"*

**M, 5, Rotorua**

## GAMES SOUGHT:

**Building  
Battling  
Racing / Driving  
Fashion /  
Designing  
Character  
Creation  
Word  
Puzzle  
Adventure  
Matching**



*"I played Farm Rules – it was challenging but that's because the quad bike was hard to turn. Barefoot Bandits Waterbomb. It looked fun. It was a bit hard because I couldn't find instructions anywhere for the game. The HEIHEI Games are different to games I would normally play. They weren't challenging enough. And they are annoying to play on a laptop. HEIHEI Games aren't much fun for me"*

**M, 9, Rotorua**

## 7-9 Year Olds

**Apps** = good for favourites; space on device of concern, challenge and pace important **playing online good** - experience  
*Device ownership likely but parent still present e.g. profiles, allow app downloads*



## Younger Kids Say... GAMES

*"I like games like puzzles. Obstacles.  
Characters. Building houses.  
Interesting animals, like cats. I like  
making characters. I like Gacha Life."*

*"I like having my games on an app. It  
is easy to find and control. I can find  
them any time."*

**F, 6 years, Auckland**

*"{On an app} it loads faster. No  
lagging. Easy." ... "I can play on HEIHEI  
because its an app on my phone"*

**M, 5 years, Rotorua**

*"Apps are easy to control and more  
simple to play – I just tap. And I can  
control. Website games are hard to  
control. I can't control with the  
mouse"*

**M, 7 years, Auckland**





## Older Kids Say... GAMES

*"Mathplayground.co.nz on the website. Like on ... On google. I like it because there is heaps and heaps of good games in 1"*

*"Puzzles games as well. I just like games that are fun and challenge my brain"*

**M, 9 years, Auckland**

*"HEIHEI Games are easy to play. I liked I-Spy cause that was a bit hard."*

*"Fanimals was funny because it had dog poo in the game. But it is kind of similar to the other games, like the flying Kiwi game"*

*"There are quite a lot of games to play – but no racing games or building games. No scary games"*

**M, 9 years, Auckland**

*"My best games are building, driving and survival. Because I find it interesting and fun and a challenge"*

**M, 9 years, Auckland**

*"I like it on a website because there's different games that you can play in one website"*

*...  
"You don't have to take up all the space on your phone with too many apps"*

**M, 9 years, Auckland**



## 5-7 Year Olds

*"She is not a big gamer. Well some of it might be hard for her to understand for now. But if she is playing it is usually just what we have put on our phones for her"*

**Caregiver, Rotorua**

## 7-9 Year Olds

*"He is allowed to play mainly educational. That is what is downloaded on the tablet. Also games they are allowed to play at school. But he is starting to favour PlayStation now. "*

**Caregiver, Auckland**



# Appendix

## APPENDIX: HEIHEI SHOWS DESIRED

### 5-7 Year Olds

**Action**

Racing  
Moto-Cross  
Heroes  
Animals (farms, pets, vets)

### 7-9 Year Olds

**Action****A family of super heroes**

Wild animals (Strange, exotic, "Unusual"); Real animals  
Great Outdoors, nature, our planet  
Real life and friendships  
Best friends

### Caregivers

New Zealand morals

**Fun while learning**

Stories with good morals  
New Zealand and the outdoors  
Kids figuring out how things work e.g. experimenting, building





# Performance Q1 & Q2 FY20

# Locations

Region	Population	Users	Adoption Rate
Wellington	522,100	16,588	3.2%
Nelson	52,400	1,604	3.1%
Canterbury	617,700	17,441	2.8%
Auckland	1,618,400	44,317	2.7%
Bay Of Plenty	317,800	7,488	2.4%
Hawke's Bay	171,400	3,986	2.3%
Taranaki	121,000	2,526	2.1%
Manawatu-Wanganui	246,200	5,045	2.0%
Waikato	472,100	9,613	2.0%
Northland	184,500	3,601	2.0%
Otago	232,300	4,456	1.9%
Gisborne	48,900	908	1.9%
Southland	100,400	1,354	1.3%
Marlborough	48,800	524	1.1%
West Coast	32,500	269	0.8%
Tasman	54,000	441	0.8%

Wellington still has the highest rate of adoption, ahead of Nelson for the first two quarters of FY20. This carries on from the trend seen in Q4 of FY19.

Canterbury and Auckland do still have relatively high adoption rates.

Note: A “user” is the sum of unique browsers from the web endpoint, and app downloads. It does not necessarily represent actual individuals.



# FY20 Q1-Q2 Results: Search

Search Term*	Searches	% of all searched terms
young riders	587	5%
fanimals	378	3%
peppa	378	3%
peppa pig	250	2%
games	177	1%
what now	168	1%
young rider	147	1%
moe	110	1%
whats your problem	117	1%
farm rules	97	1%

Full Report:  
<https://goo.gl/FmhKd4>

# FY20 Q1-Q2 Results: Games

Game	Page/Screenviews
gamefroot: the barefoot bandits	29,366
gamefroot: fanimals	27,963
farm rules	24,802
the barefoot bandits   water bomb battle game	20,533
gamefroot: māia the brave	17,776
gumboot glory	14,380
fire trap app	9,625
rosie's big oe	8,236
hobsonville point time machine	7,467
i-spy	7,459

Previously, this report was measured against “unique page views” which didn’t allow for suitable measurement between apps and web endpoints.

This report is now a simple calculation of screen views (apps) and page views (web) for the quarter.

A screen view or page view occurs on the game content screen, before the game is loaded.

Total game screen/pageviews from launch to date: 943,939

# FY20 Q1-Q2 Results: Video

Top streamed shows	% of total Q1-Q2 plays/ streams
Peppa Pig	14%
Young Riders	8%
The Drawing Show	5%
The Vloggingtons	4%
Fanimals	4%
Mãia the Brave	4%
George and Me	3%
Kitchen Science	3%
What's Your Problem	3%
Darwin + Newts	3%

Video titles have launched on different dates and have differing ep counts.



# FY20 Q1-Q2 Results: Audio

Top streamed shows	% of total Q1-Q2 plays/ streams
HEIHEI Summer Playlist	0.36%
ZooMusic	0.32%
Fatcat & Fishface	0.22%
Angel Star Songs	0.14%
That's the Story	0.09%
The Glow Show	0.08%
Captain Festus McBoyle	0.08%
Suzy & Friends	0.06%
Hei Listen! Nui	0.05%
Hei Listen! Iti	0.04%

Audio titles have launched on different dates and have differing ep counts.



