Glasshouse

NZ On Air
Irirangi Te Motu

WHERE ARE THE AUDIENCES?

JULY 2020

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

- The Where Are The Audiences? study 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 2020 study. This is the fourth 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 2020 Where Are The Audiences? study will contribute to this goal by:
  - Informing NZ On Air's content and platform strategy as well as 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.

Impact of Covid 19 lockdown

- The Where Are The Audiences? study has always been conducted in April and May to ensure results are not influenced by seasonal audience patterns. However in 2020 interviewing for the study had to be delayed due to Covid 19 lockdown Levels 4 and 3 which commenced on March 26. These conditions would have driven anomalous audience behaviour incomparable to previous studies.

- Interviewing commenced one week after New Zealand had moved to Level 2 when social distancing and gathering restrictions were still in place but New Zealanders were slowly returning to more representative behaviour.

- Fieldwork was conducted over four weeks, from May 21 to June 18. During this period New Zealand was;
  - At Alert Level 2 from May 21 – June 8.
  - Moved to Alert Level 1 on Tuesday June 9.

- A new question was added to the study in 2020 to understand audience behaviour in terms of sources of news used during lockdown and the most trusted source of news and information during this time.

Research Approach

- **The first priority in the design and conduct of the 2020 study was to ensure valid and robust comparisons to the previous three studies. Therefore, with the exception of timing, the research approach including methodology, sampling and respondent definition, question flow and wording, and weighting factors were kept consistent with all previous 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 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=1,511 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 +/-2.5%.

- 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.

Research Approach

- As in 2014, 2016 and 2018, a mixed methodology of telephone and online interviewing was used.
- N=900 interviews were completed by telephone using random digit dialling, and n=600 interviews were completed online using Consumer Link's Flybuys research panel.
- The online interviews were conducted among New Zealanders without access to a home landline.
  - The 2018 Census showed that 37% of people live in homes without a landline, resulting in the 900:500 split in sampling methodology.
- Interviewing was conducted between May 21 and June 18.
- 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 is representative of the 15+ NZ population;
  - Access to a landline, gender, age, ethnicity.

Research Approach

- 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 the type of online videos watched, 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.
- Apart from changes to channels, sites and stations to ensure accuracy, other changes made to the 2020 survey included;

New questions	Removed questions
Measuring daily online gaming behaviour	Measuring online international radio behaviour
Measuring how New Zealanders find new podcasts	Devices used to watch on demand
Sources of news during Covid 19 lockdown	Consumption of extra online material related to a TV show
	Reasons for using captioning and audio description

Abbreviations used in charts

Abbreviation	Full survey description
Online Video	Watch a video online using a site like YouTube or Vimeo, Facebook, NZ Herald, Watchme, Stuff, PlayStuff , Re: or the Spinoff
TV FTA	Watch live or recorded TV not through a Sky decoder e.g. through Freeview or live streaming
TV Pay	Watch live or recorded TV through a Sky decoder or MySKY including channels TVNZ 1, TVNZ 2, and Three and any Sky channels
NZ SVOD	Watch a TV show or other video content on a **NZ** website/service such as Netflix, Lightbox, Neon, Spark Sport, Fan Pass, Disney+, Apple TV or NZ On Screen
OS SVOD	Watch a TV show or other video content on an **overseas** website/service such as Netflix, Hulu, BBC iPlayer or Amazon Prime
Music	Listen to music including CDs, iPod, or vinyl
Music Stream	Listen to music online using a streaming service or website such as Spotify, YouTube, Apple Music, Tidal, iTunes or Soundcloud

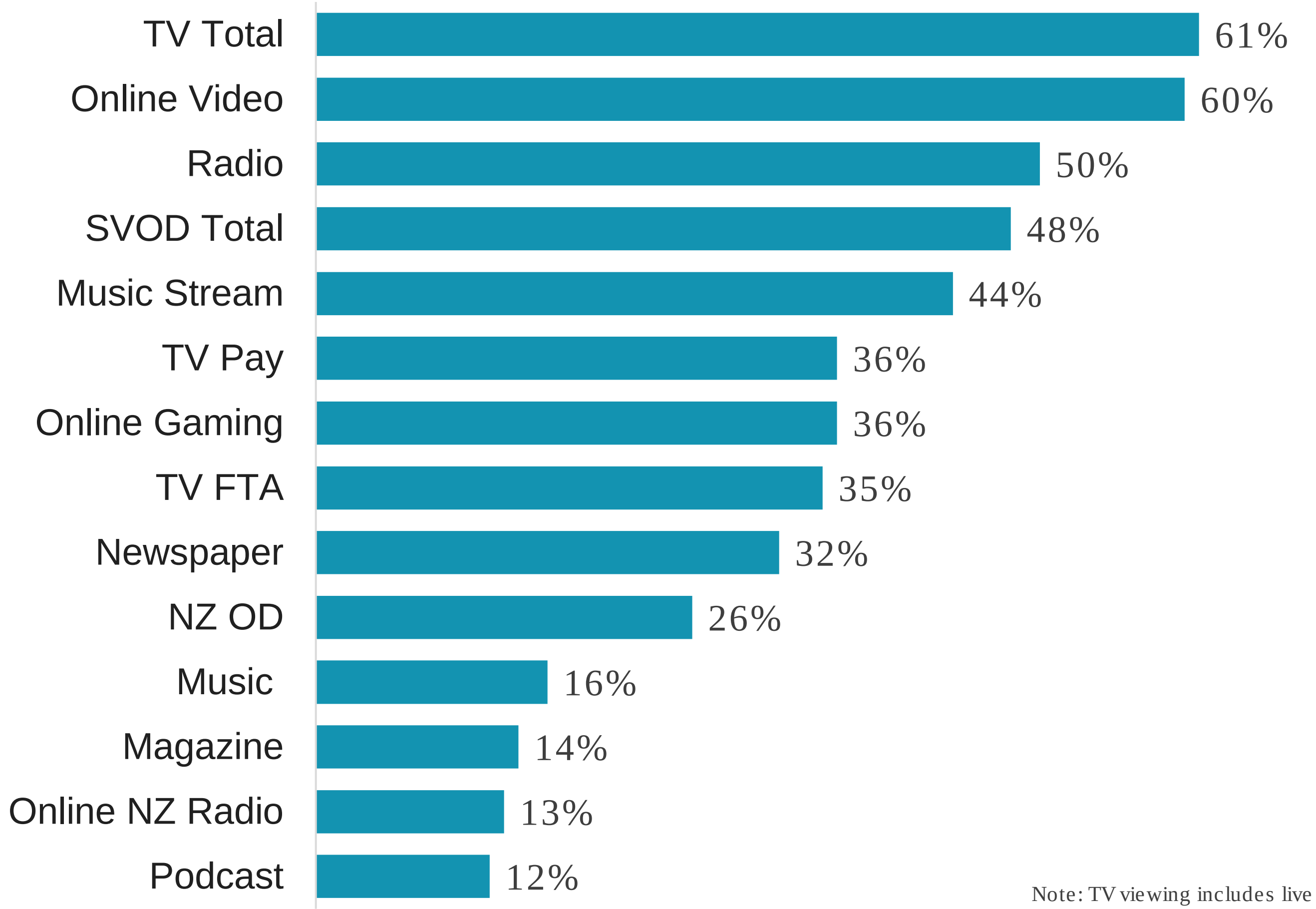
Abbreviation	Full survey description
NZ OD	Watch all or part of a TV show or other video content on TVNZ OnDemand, 3NOW, Prime On demand, Māori TV On demand or SKY On demand/SKY Go, or HEIHEI
Radio	Listen to a New Zealand radio station broadcast on radio
Online Radio	Listen to a New Zealand radio station online including iHeartRadio or Rova
Online gaming (new 2020)	Play games online on a gaming console, PC/laptop, phone or tablet
Podcasts	Listen to a podcast
Newspaper	Read a newspaper (including online)
Magazine	Read a magazine (including online)
TV Total	Total (net) Linear TV (TV FTA + TV Pay)
SVOD Total	Total (net) SVOD (NZ SVOD + OS SVOD)

Summary & Conclusions

Daily audience sizes in 2020. The audiences on traditional and digital media are now of relatively equal size. Six in ten New Zealanders watch TV and/or online video each day, and up to one in two New Zealanders listen to broadcast radio, watch SVOD, and/or listen to streamed music.

Daily reach of all media 2020 – all New Zealanders 15+

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.



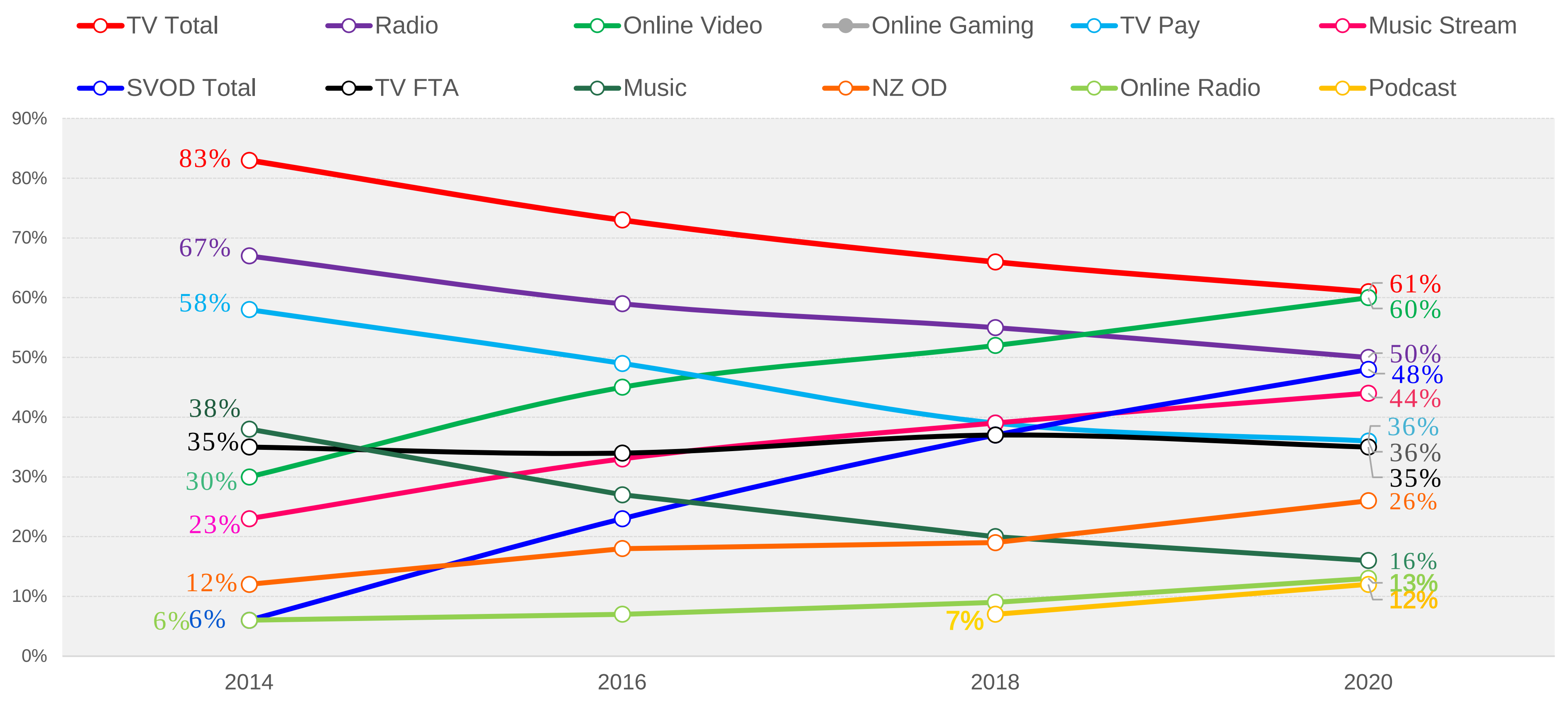
Note: TV viewing includes live and time shifted viewing, in and out of home.

Base: All New Zealanders 15+: (2020 n=1,511).

Daily audience sizes over time. Audience trends show nearly all traditional media audiences continue to decline over time, while all digital media audiences have increased since 2018. These trends show no sign of stabilising.

Daily reach of all media over time – all New Zealanders 15+

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.



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

Daily audience sizes. If current trends continue then 2020 will be the cross -over point where digital media over-takes traditional media in delivering the largest daily audiences in New Zealand.

- In 2018 there were signs the growth rate of digital media may have been slowing. However the 2020 results show rates of growth have continued or, in the case of online video, music streaming and on demand, have accelerated since 2018.

- If these trends continue, and there is little in this study to suggest otherwise, then by 2021;
  – Online video will attract the biggest daily audience in New Zealand
  – SVOD will have over-taken radio, and perhaps linear TV, to deliver the second or third biggest audience
  – Music streaming may also have overtaken radio listening.

- Therefore 2020 would represent the cross-over point between traditional media and digital media attracting the biggest audiences in New Zealand.

- Within this overall result there are, of course, many different audiences, some of whom (eg. youth, Asian) have already passed this cross-over point. Others, such as older New Zealanders and Māori are further from it. These trends are discussed in a later section.

- One implication of the cross-over is that this represents the point in time of maximum audience fragmentation across media types.

- Balancing this fragmentation is the emergence of strong market leaders within many digital media with other providers not showing either large audiences or growth over time.

Daily audience sizes. The decline in linear TV overall continues to be driven more by declining audiences on the SKY TV platform, while free to air audiences remain stable.

- In 2014 nearly six in ten New Zealanders (58%) watched TV on the SKY TV platform each day. That proportion has now fallen to 36%. This result may have been influenced by the absence of live sport during the survey period.

- Over the same period the audience watching linear TV on a free to air platform is stable (38% in 2014; 35% in 2020).

- These viewing trends are reflected in the proportion of New Zealanders who have daily access to SKY TV. In 2014 57% of New Zealanders had daily access to SKY TV compared to 33% who do so in 2020, and some audiences are significantly less likely to have access to SKY TV;
  - 15-34 year olds (17%)
  - Double income couples, without kids (12%)
  - Asian New Zealanders (12%)
  - Aucklanders (28%).

Daily audiences over the day 2020. The pattern of media consumption varies over the course of a day, with different media attracting bigger audiences at different times. There has been little change in this pattern of consumption since 2018.

6am-9am

- Radio attracts the biggest audience at the start of the day (37% reach) and while it is overtaken by online video and linear TV between 9am to 6pm, it holds this audience (36%) over this day time period.
- Online video attracts the second biggest audience during this time (33%), followed by streamed music (26%) and linear TV (24%).

9am-6pm

- Online video attracts its biggest audience during this time (43%), followed by TV (38%), radio (36%) and music streaming (35%).
- SVOD attracts 30% of New Zealanders during this period.

6pm-10.30pm

- During the traditional TV peak period, linear TV continues to attract the biggest audience by a significant margin (40%).
- Online video (29%) and SVOD (29%) are next most popular and attract very similar sized audiences over this period.

10.30pm – midnight

- There is a very significant decline in all audiences after 10.30pm with no media reaching more than 12% of New Zealanders.

Time spent using different media. Linear TV continues to hold New Zealanders' attention the longest by a significant margin, although this has declined for the first time. Time spent watching online video lags well behind TV, SVOD and radio despite increases in time spent using all digital media.

- New Zealanders continue to spend more than two hours watching linear TV each day (137 minutes), with pay TV viewers continuing to be heavier viewers than free to air viewers.

- However time spent watching TV has declined for the first time (from 156 to 137 minutes), driven by a decline in time spent viewing on the SKY TV platform (from 92 to 78 minutes). Time spent viewing on a free to air platform is stable. The decline in time spent viewing on the SKY TV platform will be influenced by the absence of live sport during the survey period.

- Conversely time spent using digital media has increased significantly for online video, SVOD, music streaming and on demand.

- New Zealanders now watch SVOD for over 1½ hours each day making it the second most popular media in terms of time spent.

- Radio listening has declined since 2018 (from 97 to 83 minutes) dropping behind SVOD.

- Online video (67 minutes) and streamed music (65 minutes) have both increased equally in terms of time spent since 2018. However online video's growing audience size is not reflected in the time New Zealanders spend with this media.

- This is the first measure of online gaming and it shows New Zealanders using this media for nearly an hour a day (56 minutes).

- Looking only at users of each media does not change the above conclusions. Linear TV attracts the most time (220 minutes among viewers) driven by SKY TV viewers (213 minutes), followed by SVOD (201 minutes among viewers). Engagement with online video (115 minutes among users) still lags behind TV, SVOD, radio, online gaming and streamed music.

Changes in video media audiences. For the first time this study is showing a decline in TV audiences not just from lighter TV viewers but also from heavier viewers – particularly from a pay TV platform. This is benefiting both SVOD and online video.

- The 2016 and 2018 studies showed declining audience reach among SKY TV viewers, but increased time spent viewing. At the same time, time spent viewing SVOD and online video did not increase in 2018. These trends suggested lighter viewers were dropping out of linear TV and switching to SVOD and/or online video.

- In 2020 time spent viewing TV on a pay TV platform has declined along with audience size, resulting in increases in time spent viewing SVOD and online video. This suggests that heavier TV viewers are now dropping out of linear TV and particularly from the SKY TV platform. Again, it is possible this result may be influenced by the absence of live sport during the survey period.

- These trends are also reflected in the devices and platforms New Zealanders now have daily access to;
  - Six in ten New Zealanders (63%) now have access to SVOD and particularly Netflix (61%).
  - Nearly one in two have access to a smart TV connected to the Internet (46%).
  - More than a third have Chromecast or similar (37%).
  - However just one third (33%) have daily access to SKY TV.

Changes in music audiences. The rapid, large scale change in the way New Zealanders listen to music continues with no sign of stabilising. Three times as many New Zealanders listen to streamed music as music played on physical formats, and they listen to streamed music for twice as long.

- Just 16% of New Zealanders listen to music on CDs, ipods or vinyl each day in 2020, down from 30% in 2018 and 38% in 2014.

- More than four in ten (44%) listen to streamed music each day in 2020, up from 39% in 2018 and 23% in 2014.

- New Zealanders who listen to streamed music do so for 2½ hours, compared to 1½ hours among those who listen to physical formats.

Potential impact of Covid 19 on results. While it is impossible to isolate the impact of the preceding Covid 19 lockdown and Levels Two and One on the audience behaviour captured in this study, there are no anomalous results or aberrant media trends in the results. However there is evidence of impact on use of some specific channels, sites and stations.

- This survey shows that the TVNZ 1 news and updates was New Zealanders' most widely used and most trusted source of information to keep up to date during the Covid 19 outbreak. This behaviour is perhaps reflected in the stability of TVNZ 1's daily audience compared to 2018 while all four of the other top five TV channels show decline. This stability may in turn have contributed to the overall stability of the free to air TV audience in 2020.

- Similarly both RNZ National and Newstalk ZB show increases in daily audiences since 2018 while nearly all other radio stations show decline or are stable since 2018.

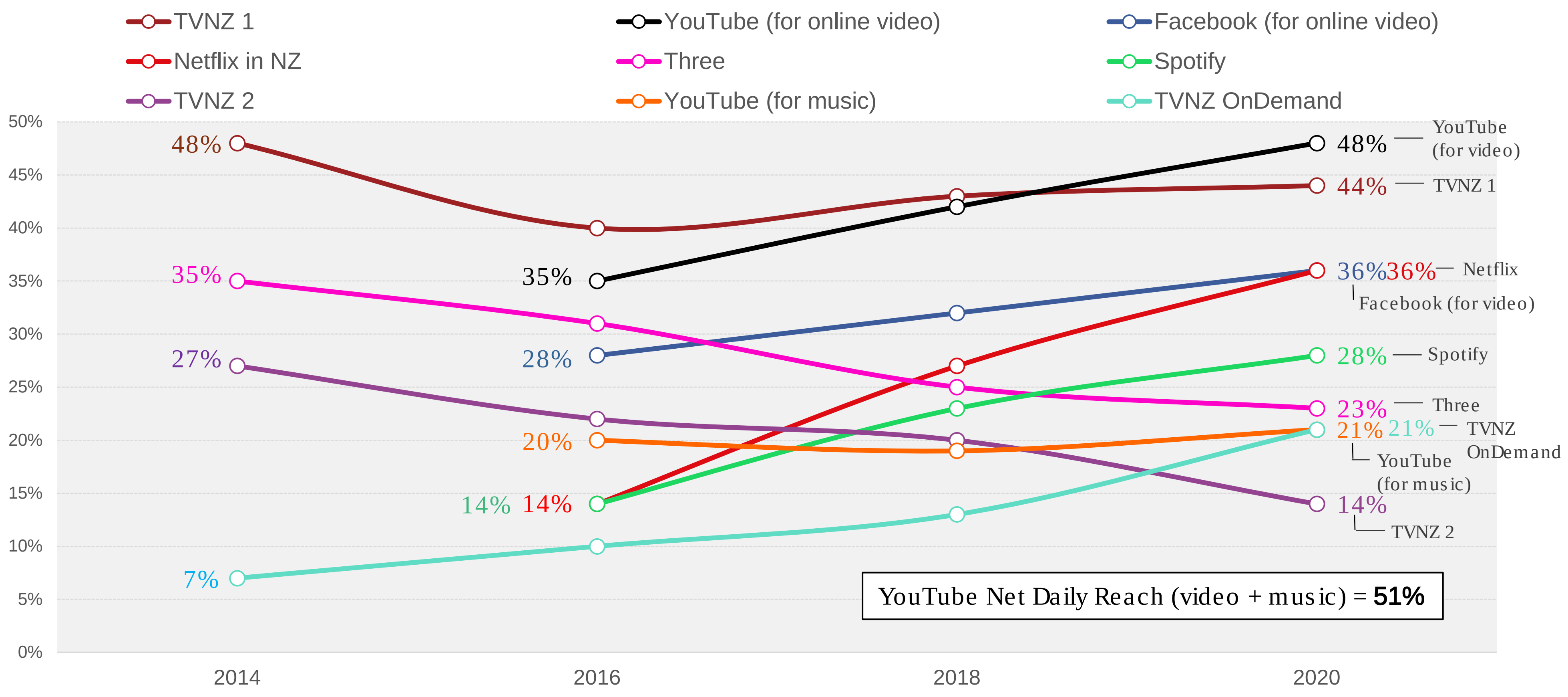
- SKY Sport's daily audience shows significant decline since 2018, however this will be strongly influenced by the absence of live sport during the survey period. It is possible this decline has influenced both the audience size and time spent viewing linear TV on the SKY TV platform.

- **These trends aside we have confidence that the audience trends captured in this study are an accurate representation of New Zealand audience behaviour in 2020.**

Most popular channels, sites and stations 2020. YouTube is now the most popular site, station or channel, over-taking TVNZ 1. TVNZ 2 and Three are the only other traditional media providers in the top sites, channels and stations and both have declined since 2018. Netflix, Spotify, Facebook (for video) and TVNZ OnDemand have all increased their audiences significantly since 2018.

Most popular channels, sites & stations – all New Zealanders 15+

Q: Which of the following did you use yesterday?



Next five:

• Stuff (video)	12%
• NZ Herald (video)	11%
• RNZ (National)	11%
• Prime	9%
• Newstalk ZB	9%

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

Daily reach of specific channels, sites and stations.

Online video sites

- YouTube is the most popular online video site, reaching nearly one in two New Zealanders each day (48%), followed by Facebook (36%). Both these sites continue to increase their daily audience while all other sites are stable since 2018.

- Stuff (12%) and NZ Herald (11%) are next most popular among New Zealanders.

TV Channels

- TVNZ 1 attracts the biggest audience to a single TV channel (44%) by a significant margin. This audience size is stable since 2018 while nearly all other TV channels show decline - in particular TVNZ 2 (down from 20% to 14%).

- SKY Sport's daily reach has also declined significantly since 2018 (from 10% to 5%) but this will be driven mainly by an absence of live sport during the survey period.

- SKY Movies declined significantly in 2018 but is the only TV channel to show increased reach in 2020 (from 2% to 5%).

- The overall decline in linear TV viewing means fewer New Zealanders are using sources of information to learn about new NZ made TV shows.

Daily reach of specific channels, sites and stations.

SVOD providers

- Netflix is the dominant SVOD provider with more than one in three New Zealanders (36%) watching it each day.
- No other provider reaches more than 8% of New Zealanders, and none show significant growth since 2018 other than Amazon Prime.
- SVOD is an example of a digital media that now has strong market leaders and a range of less popular alternatives.

On demand sites

- TVNZ OnDemand's daily reach now exceeds one in five New Zealanders (21%) – up significantly from 13% in 2018.
- No other on demand site reaches more than 5% of New Zealanders each day and no other site has grown its audience since 2018.
- On demand is another example of a digital media with a dominant but still growing market leader and a range of smaller, stable alternatives.

Daily reach of specific channels, sites and stations.

On demand sites (cont'd)

- How New Zealanders use on demand continues to evolve. While most viewers continue to use this media as a source of catch up, there has been another increase in the proportion who use on demand as a primary source of content.

- In a potentially related trend, the incidence of PVRs continues to decline, which may influence how New Zealanders use on demand by maintaining it as a source of catch up.

- Another characteristic of on demand is its broad user profile compared to other media. On demand is less impacted by the generation gap that influences most media consumption. The combination of TV based content and a digital channel means this media appeals to both older traditional media users and younger more digitally savvy media consumers.

Daily reach of specific channels, sites and stations.

Radio stations

- RNZ National is the most popular radio station, reaching more than one in ten New Zealanders (11%) each day, followed by Newstalk ZB (9%).
- These two stations are the only ones to show an increase in daily reach since 2018. This trend may be impacted by New Zealanders being more engaged in news during the survey period due to the Covid 19 outbreak.
- No other radio station reaches more than 4% of New Zealanders each day, and most have declined in daily reach since 2018.

Music streaming sites

- Spotify (28% daily reach) is the most popular site for listening to streamed music, followed by YouTube (21%).
- Spotify has grown in popularity since 2018 (from 23%), while YouTube (for music) is stable (19% in 2018).
- Music streaming is another example of a digital media with strong market leaders, reducing audience fragmentation.
- The growth of Spotify and the decline in listening to most radio stations now results in streaming services being equally influential as radio stations and word of mouth from friends and family in terms of New Zealanders finding new music.

Differentiating factors in media usage. The primary differentiating factor influencing New Zealanders' media consumption continues to be age and lifestage . However the generation gap between younger and older New Zealanders is now less strong and clearly defined as middle aged New Zealanders adopt digital media. Secondary factors also play an important role.

Primary Differentiator:

- Age / Lifestage

Secondary Factors

- Socio-economic level – also a strong influence on access to devices and platforms
- Ethnicity
- Region
- Gender
- Access to devices and platforms

Primary differentiator. Previously there was a clear generation gap at age 40-45 dividing audiences more and less likely to engage with digital or traditional media. Over time, middle aged New Zealanders have adopted digital media in increasing numbers blurring the lines between generations.

- In 2020 there is no longer a stark divide within a narrow age range delineating two types of audiences more and less likely to consume traditional or digital media.

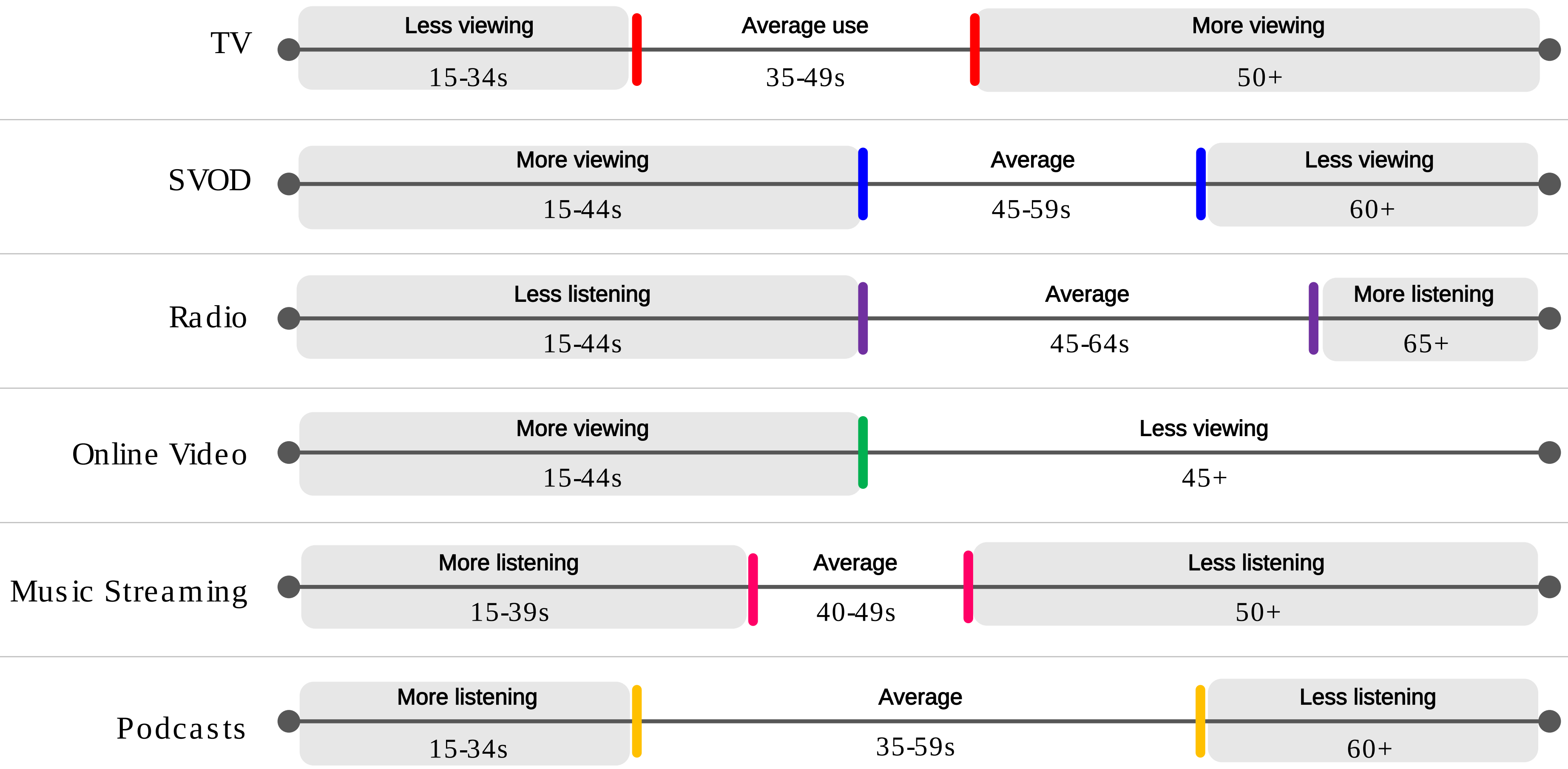
- For most media it is now more accurate to say there are three generations of media consumers; a young audience where digital media now dominates, a middle aged audience divided between traditional and digital media, and a much older audience among whom traditional media still dominates.
  - The exceptions are online video which continues to show a strong generation gap and on demand which has broader appeal across different age groups.

- This three generation landscape is a result of middle aged New Zealanders continuing to reduce their use of traditional media and adopting digital media in greater numbers.

- While 2020 may be the cross-over point between digital and traditional media attracting the biggest daily audiences overall, among 15-39 year olds this point occurred in 2018 or earlier. We may now be at that point among 40-59 year olds. However there is little sign of digital media closing the large gap to traditional media among 60+ year olds.

The three generations of media use. The ages of the three generations of media consumers vary by media, with the middle generation typically being defined between a broad age range of 35 and 59.

Defining daily media audiences by age



- Digital media is growing at a similar rate among 15-39s and 40-59s, but of course digital media audiences are already larger among 15-39s.
- Similarly traditional media audiences are declining at a similar rate among 15-39s and 40-59s, but traditional media remains more popular among 40-59s.
- Among 60+ year olds, traditional media remains dominant and stable in size, with digital media not growing significantly to close the gap.

Secondary factors impacting media consumption.

Socio-economic level*

- Higher socio-economic groups are more likely to use on demand, SVOD and podcasts each day. They are less likely to play online gaming. This group is also more likely to have access to SKY TV, a PVR, a TV, a smart TV connected to the Internet, and Chromecast or similar.

Ethnicity

- New Zealanders of Asian descent are significantly less likely to watch TV (28% daily reach) or listen to broadcast radio (37%), and more likely to watch online video (86%) and listen to streamed music (66%). Asian ethnicities are significantly less likely to have access to a TV (55%) or a radio (35%), and just 12% have SKY TV.
- Māori are more likely to watch on demand (32%) and listen to streamed music (54%) each day. They are also more likely to have access to SKY TV (47%), a PVR (38%) or a games console (38%).
- Pasifika are more likely to use online video (77%), listen to streamed music (63%) or have access to a games console (35%).

Region

- Aucklanders are more likely to engage with digital media overall than the rest of the country. In particular this region is more likely to watch SVOD (52%), watch online video (68%) and listen to streamed music (50%) each day. They are less likely to watch linear TV (51%).

Gender

- Males are more likely than females to watch online video (66%), listen to streamed music (48%) or listen to podcasts (15%).
- Females are more likely than males to watch on demand each day (29%).

* For the purposes of this analysis, socio-economic level is a term used to summarise the trends evident in media behaviour among different income and occupation groups.

Secondary factors impacting media consumption. Access to devices and platforms is intrinsically linked to media consumption. The same demographic and socio-economic factors that influence media consumption also impact access to devices and platforms.

- Access to devices that enable traditional media use have all declined since 2018 including a working TV (78%), radio (61%), SKY TV (33%), and PVRs (27%).

- Conversely the proportion of New Zealanders who now have access to devices and platforms that enable digital media consumption has increased – SVOD (63%), smart TV connected to the Internet (46%), Chromecast or similar (37%), gaming console (27%).

- Demographic and socio-economic factors also play a significant role;

Digital media enabling	
Less likely to have access…	**More likely to have access…**
Older New Zealanders	Younger New Zealanders
	Higher socio-economic groups

Traditional media enabling	
Less likely to have access…	**More likely to have access…**
Younger New Zealanders	Older New Zealanders
Asian New Zealanders	Higher socio-economic groups
Aucklanders	Māori

Use of unauthorised platforms. Overall use of unauthorised platforms continues to grow only slowly, including among younger New Zealanders. No more than one in ten engage in these activities once a week or more.

- Slightly more than one in two New Zealanders (51%) have never engaged in any activity involving unauthorised platforms, and this has not changed significantly since 2018.

- Downloading songs or albums for free is the activity which the most New Zealanders have ever done but, reflecting the growth of streamed music, this is now the least frequent of these activities.

- VPN use is the only unauthorised platform showing growth in frequency of use, but only 7% of New Zealanders (and 9% of 15-34 year olds) do this once a week or more.

Use of captioning and audio description. The use of captioning and audio description continues to grow.

- One in three New Zealanders (32%) ever use captioning while watching TV – significantly up from 21% in 2018.
- Six percent of New Zealanders now ever use audio description while watching TV – up from 3% in 2018.

Source of news and information during Covid -19.

- TVNZ news and updates (online and broadcast) were the most widely used source of information during the Covid 19 outbreak (47% used this source).

- This source was also the most trusted (28%).

- The second most trusted source was the official Covid 19 website (8%).

- Stuff (26%) and NZ Herald (22%) were the second and third most widely used sources of news and information.

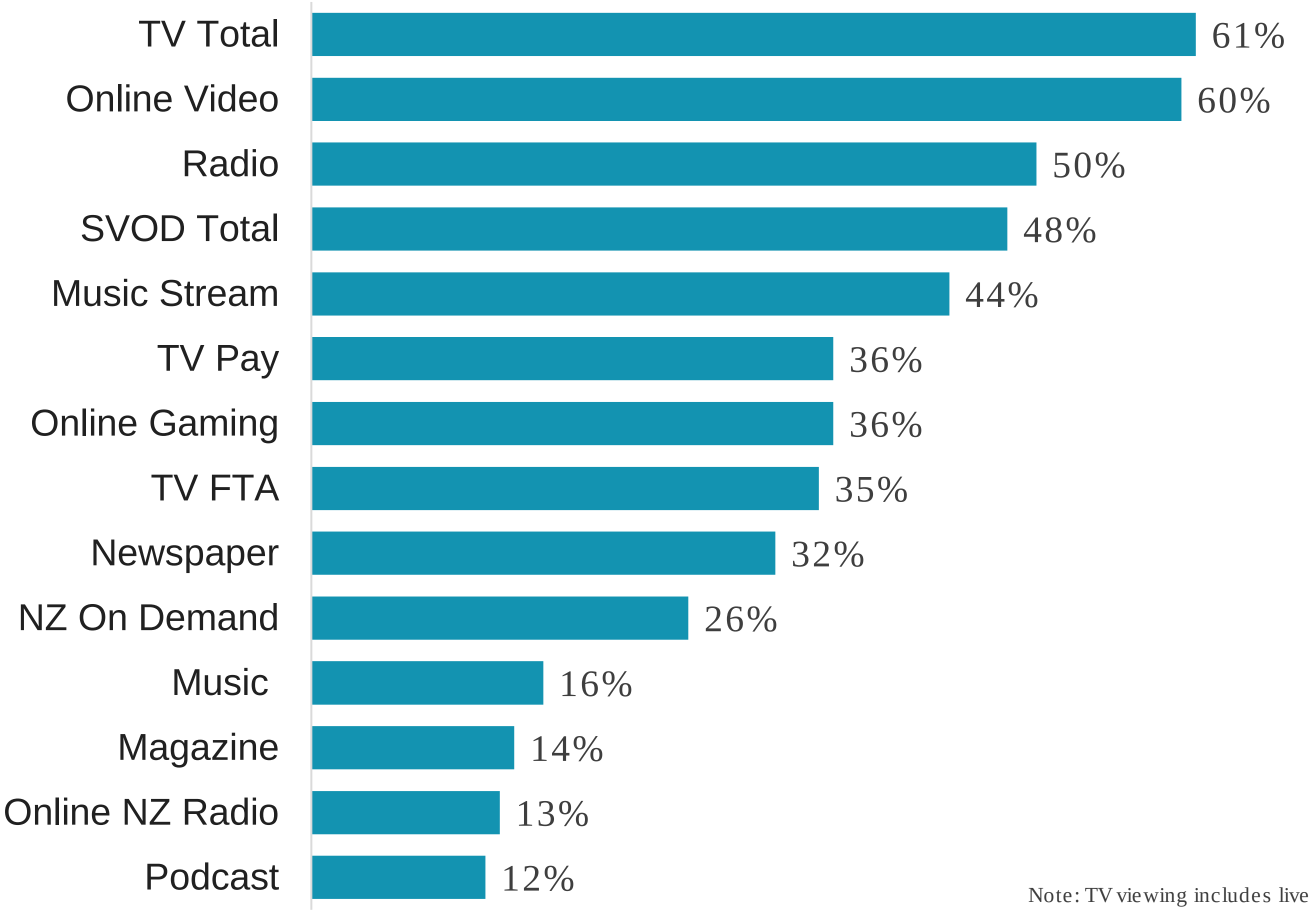
- Social media was widely used as a source but it was the most trusted source of very few New Zealanders.
  - 15-24 year olds were more likely to trust word of mouth from friends and family or social media (9% cf. 2% overall).

Daily Media Consumption

Linear TV (61%) and online video (60%) are now equally the most popular media, each reaching six in ten New Zealanders each day.

Daily reach of all media 2020 – all New Zealanders 15+

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.



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

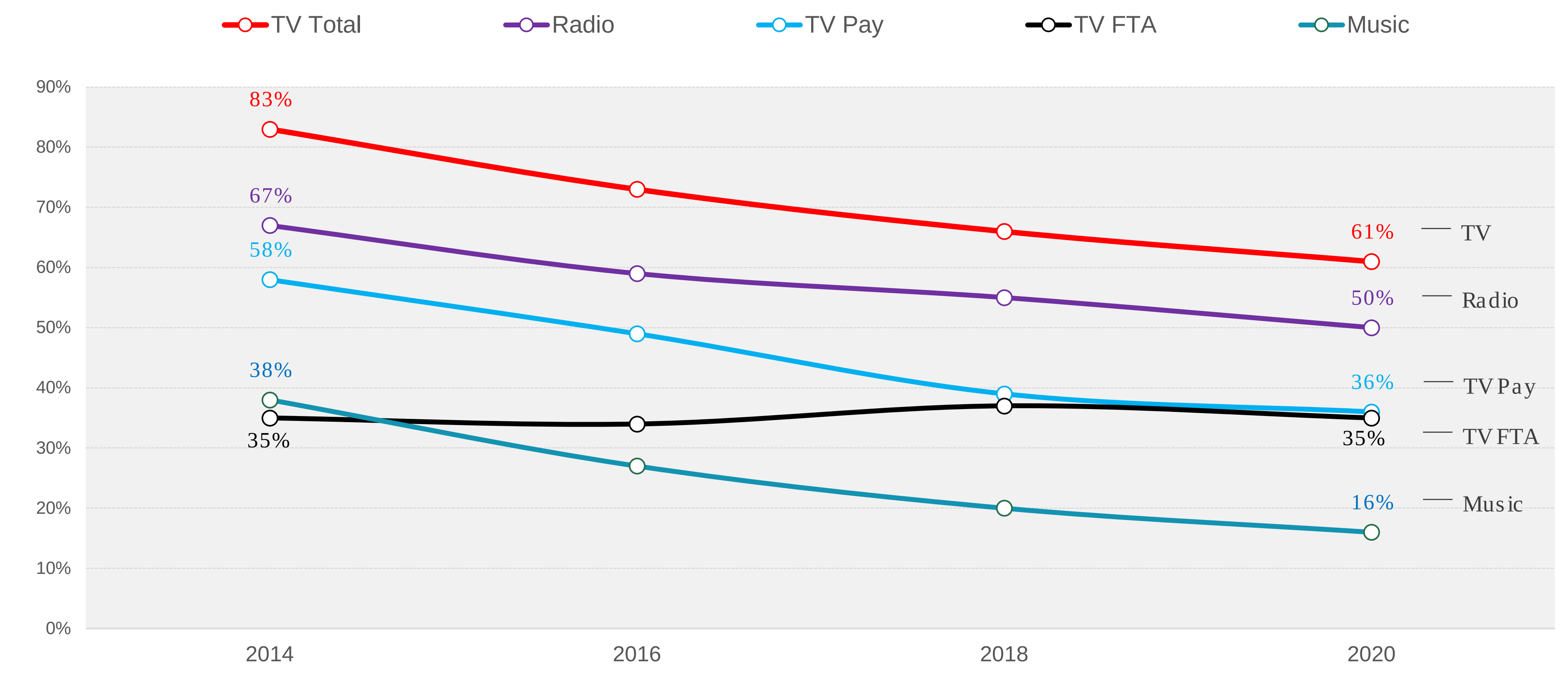
- Different tiers of audience size:
- Radio and SVOD each reach one in two New Zealanders, with music streaming only slightly below these media.
- Pay and FTA TV each reach one in three New Zealanders, the same as online gaming and newspapers.
- On demand reaches one in four New Zealanders.
- And approximately one in seven use the remaining media each day.

Base: All New Zealanders 15+: (2020 n=1,511).

All traditional media are showing ongoing consistent declines in daily audience size.
The only exception is the stability of audiences on a free to air TV platform, which means that the overall decline in TV audiences is being driven by the decline in audiences on a pay TV platform.

Daily reach of traditional media over time – all New Zealanders 15+

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.



- The audience watching linear TV on the SKY TV platform has declined from 2018 and may be influenced by the absence of live sport during the survey period.
- However this audience has also declined significantly in the two previous studies so the most recent decline may be a continuation of that ongoing trend.

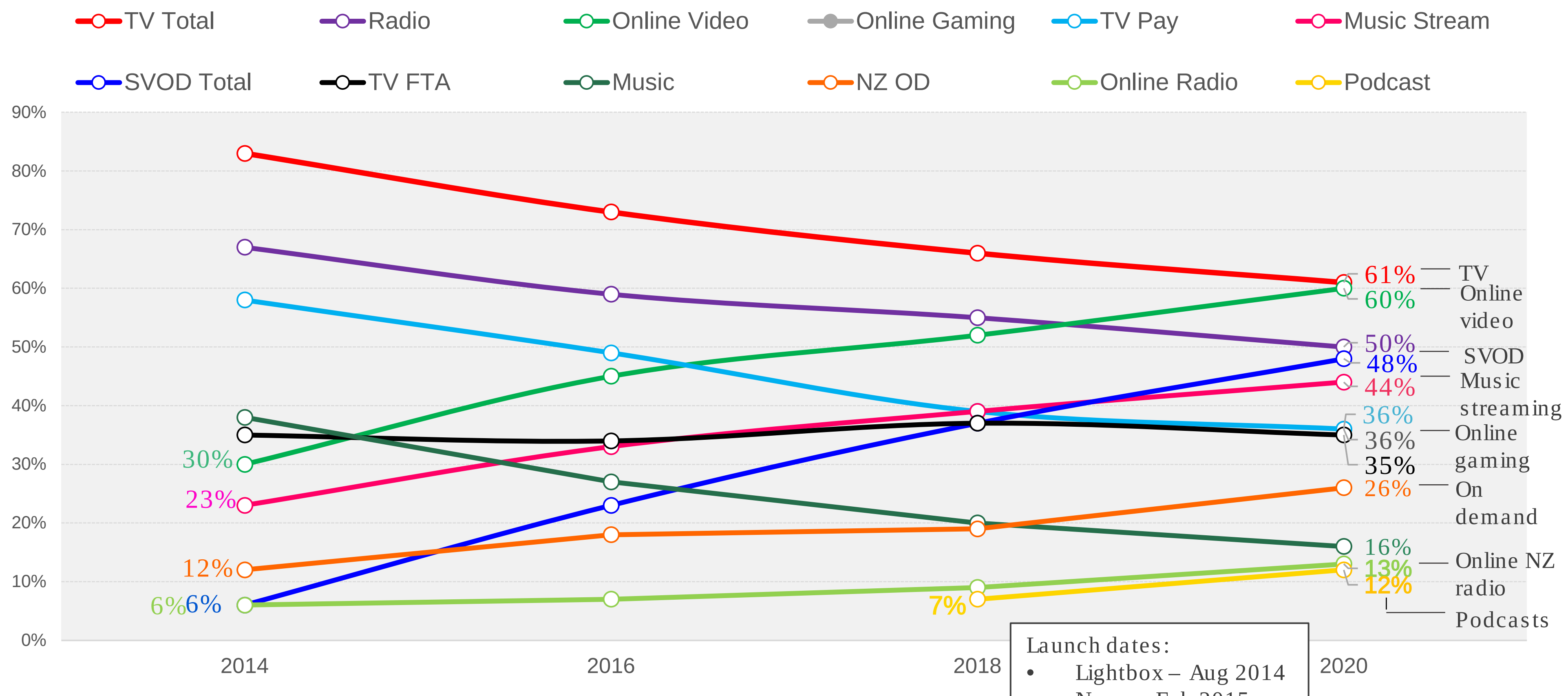
Note: TV viewing includes live and time shifted viewing, in and out of home.

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

In 2018 there were signs of slowing growth in digital media audiences (online video, music streaming, on demand) but growth has since increased. 2020 could therefore be the cross -over point between traditional and digital media attracting the biggest audiences overall - though later charts show this point has already passed among some audiences (eg. youth, Asian New Zealanders).

Daily reach of all media over time – all New Zealanders 15+

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.



Launch dates:
- Lightbox – Aug 2014
- Neon – Feb 2015
- Netflix – Mar 2015
- Spotify – May 2012

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

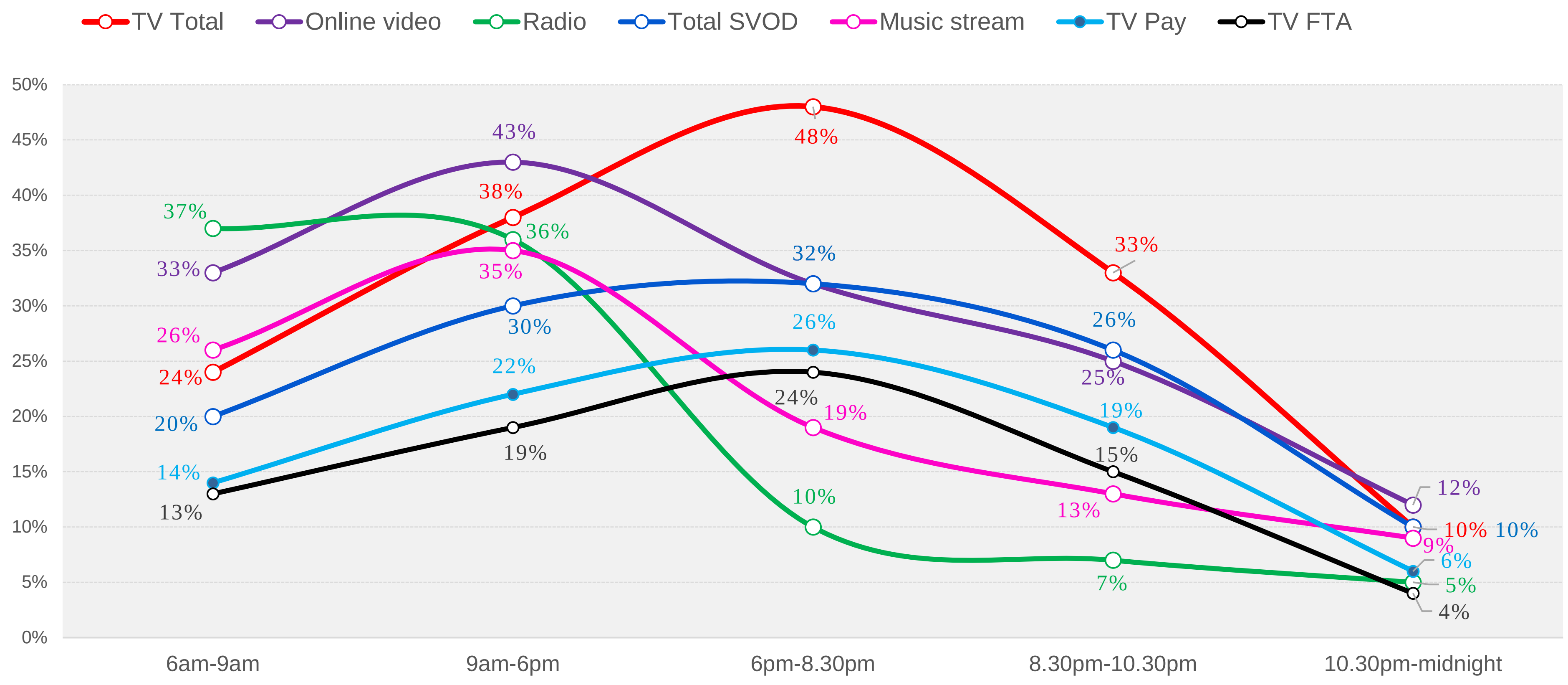
- In 2014 the daily reach of online video was below all traditional media but now captures the equal biggest audience each day.
- In 2014, SVOD reached 6% of New Zealanders each day and now attracts one in two.
- Streamed music daily reach has doubled since 2014 but is growing more slowly than online video and SVOD.
- **The cross-over point also represents the point of maximum audience fragmentation across media types.**

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

The way New Zealanders consume media changes over the day. Radio attracts the biggest audience at the start of the day but declines rapidly after 6pm. The online video audience peaks during the day (9am - 6pm), while TV continues to attract the biggest audience during peak (6pm-10.30pm). SVOD attracts its biggest audience between 9am and 8.30pm.

Reach of media over the day 2020 – all New Zealanders 15+

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.



There has been little change in the overall pattern of consumption since 2018, with two exceptions:

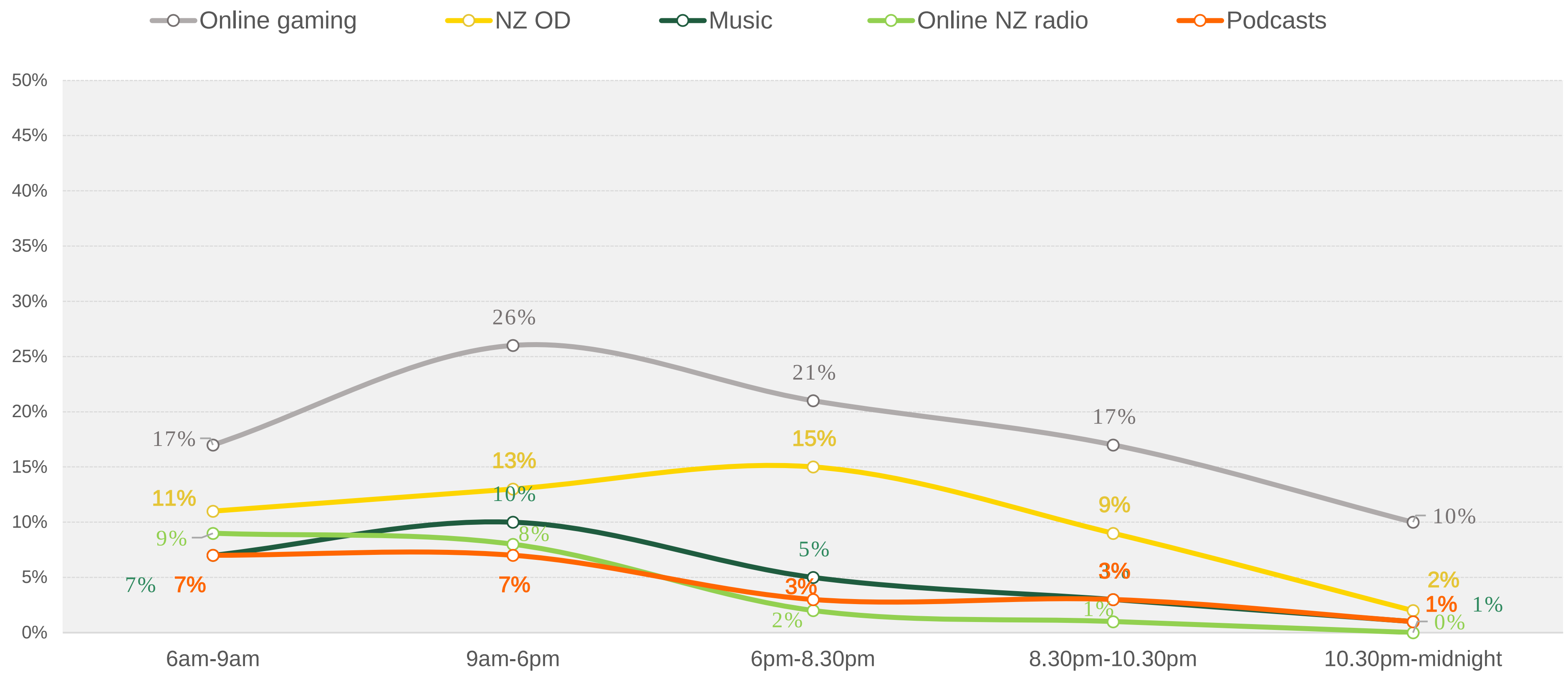
- Online video now attracts the biggest audience between 9am and 6pm, where previously it was behind both TV and radio.
- SVOD now attracts the second biggest audience during TV peak time where previously it was behind online video.

Base: All respondents: (2020 n=1,511).

The audience for online gaming is relatively steady but peaks during the day between 9am -6pm. The on demand audience is biggest between 6pm and 8.30pm.

Reach of media over the day 2020 – all New Zealanders 15+

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.



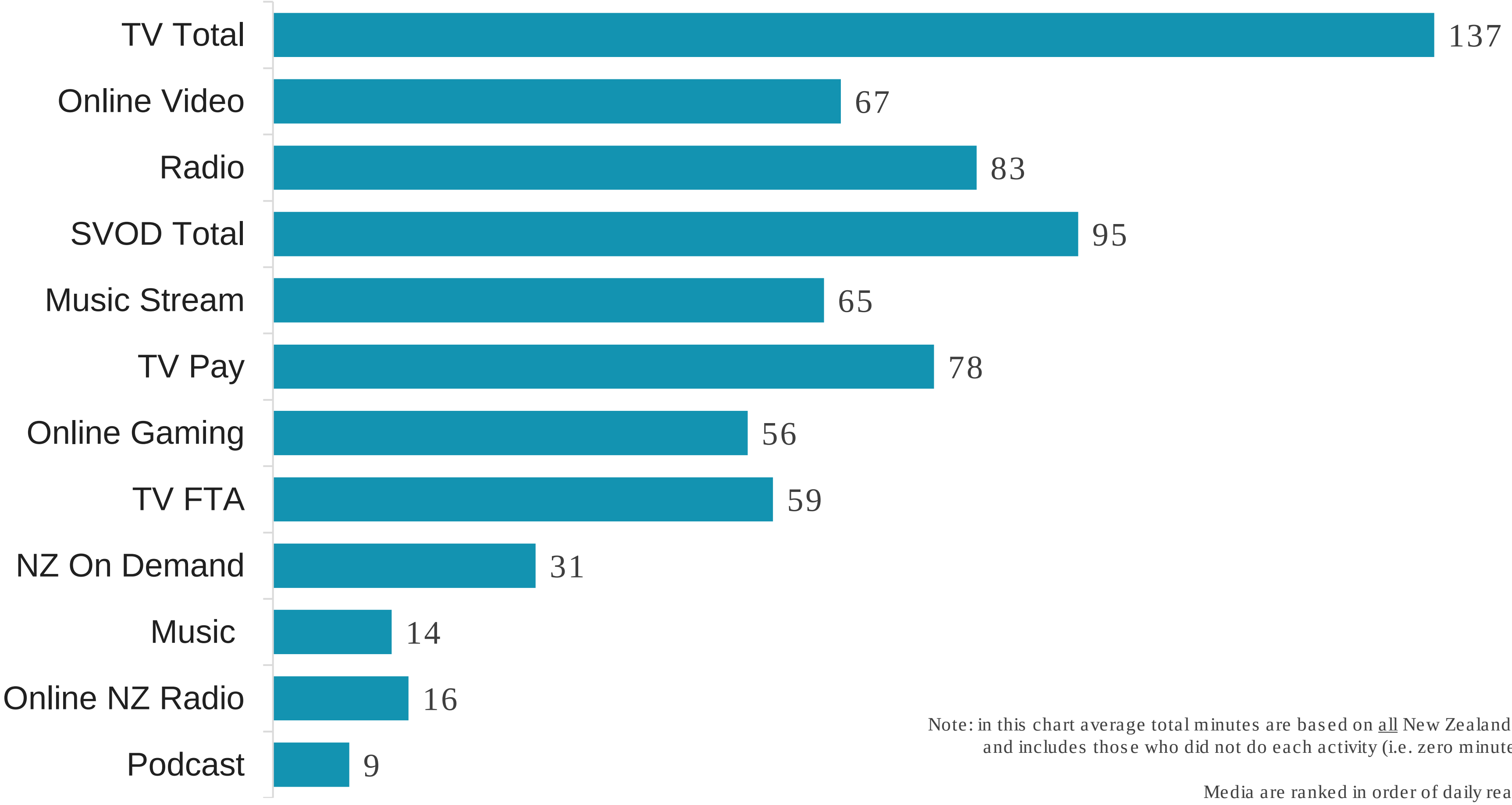
There has been no change in the overall daily pattern of consumption of these media since 2018.

Base: All respondents: (2020 n=1,511).

Linear TV continues to hold New Zealanders' attention longest – more than two hours per day on average. New Zealanders watch SVOD for the second longest (just over 90 minutes per day), and listen to the radio for slightly less time (83 minutes). Online video attracts the equal biggest audience size, but New Zealanders consume this media for less time than TV, radio and SVOD.

Time spent consuming media 2020 – average minutes per day. All New Zealanders 15+

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



Note: in this chart average total minutes are based on all New Zealanders and includes those who did not do each activity (i.e. zero minutes).

Media are ranked in order of daily reach.

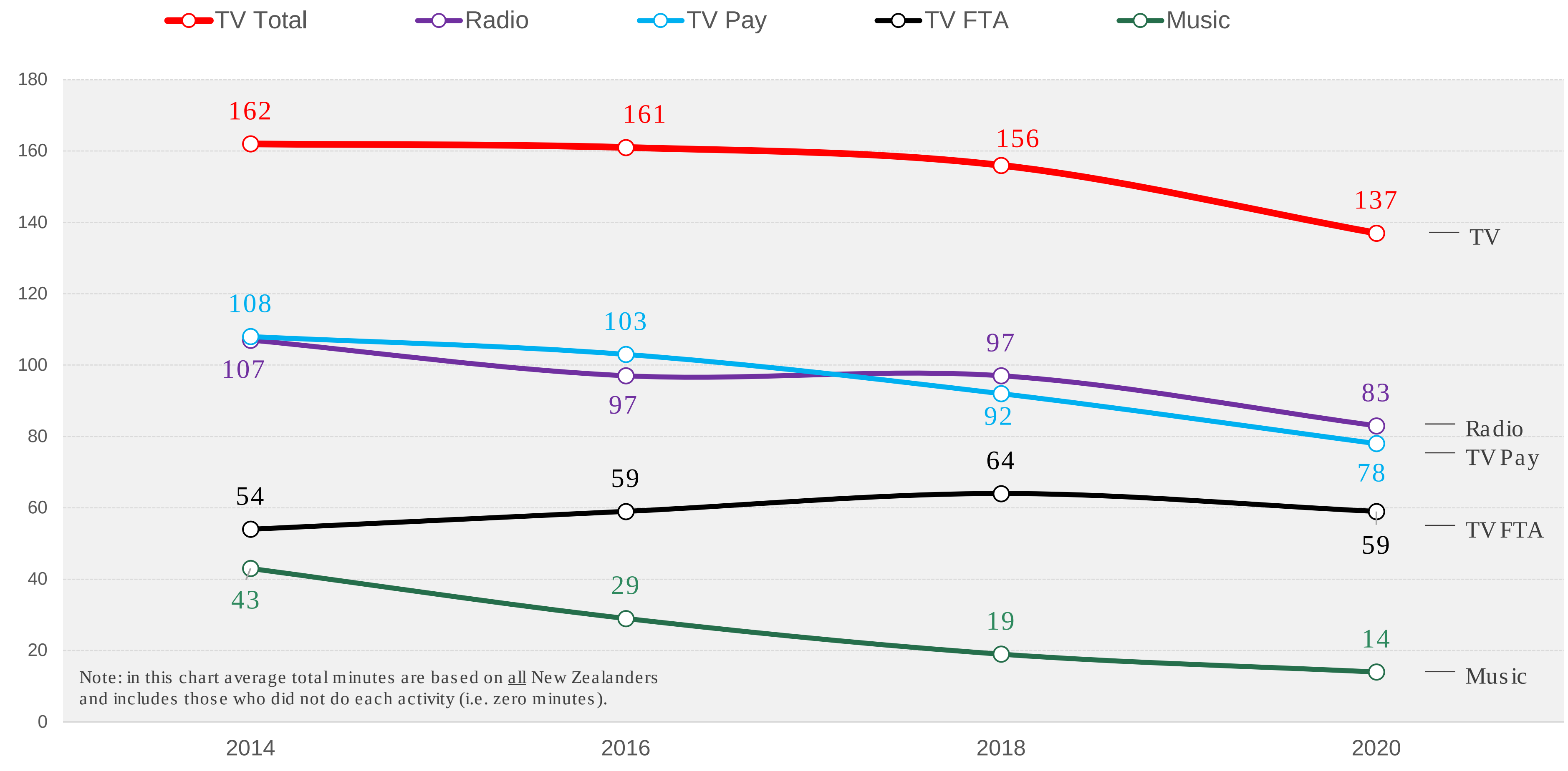
- Online video, music streaming, and online gaming are all consumed for about one hour per day.
- On demand is viewed for about half an hour a day on average.

Base: All New Zealanders 15+: (2020 n=1,511).

Time spent using all traditional media has declined since 2018, and for the first time this includes linear TV – down from over 2½ hours in 2018. This decline is driven by decreased time spent viewing TV on a Pay TV platform, as time spent viewing on a FTA platform is stable.

Time spent consuming traditional media over time – average minutes per day. All New Zealanders 15+

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



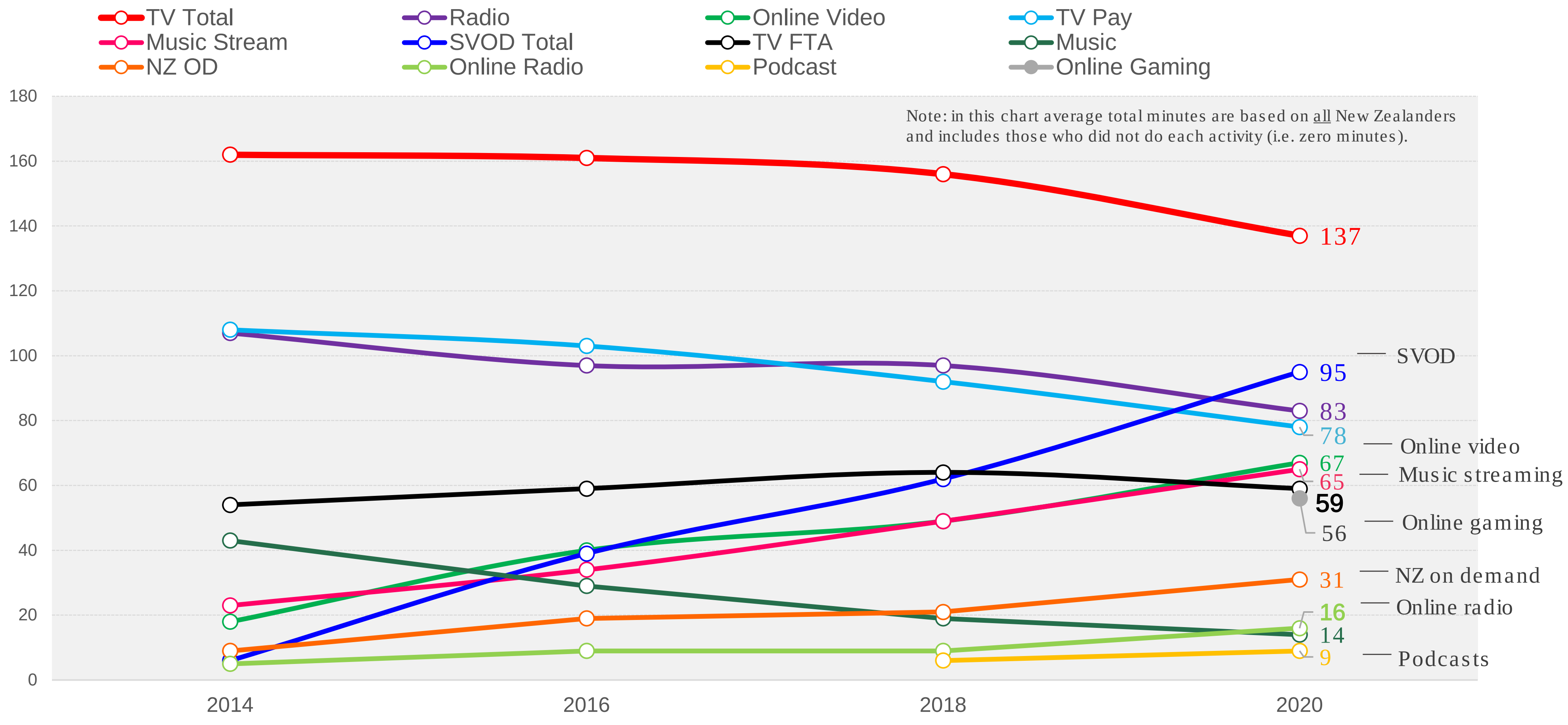
- As with the decline in audience size on the SKY TV platform, the decline in time spent viewing on this platform could be influenced by the lack of live sport during the survey period.
- However time spent viewing on the SKY TV platform also declined from 2016 to 2018 so the most recent decline may also be part of that ongoing trend.

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

Time spent using SVOD, online video, NZ on demand and music streaming has not only grown but accelerated since 2018. As with audience reach, time spent using media is at, or close to, the cross-over point where New Zealanders spend equal time with digital media and traditional media.

Time spent consuming all media over time – average minutes per day. All New Zealanders 15+

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



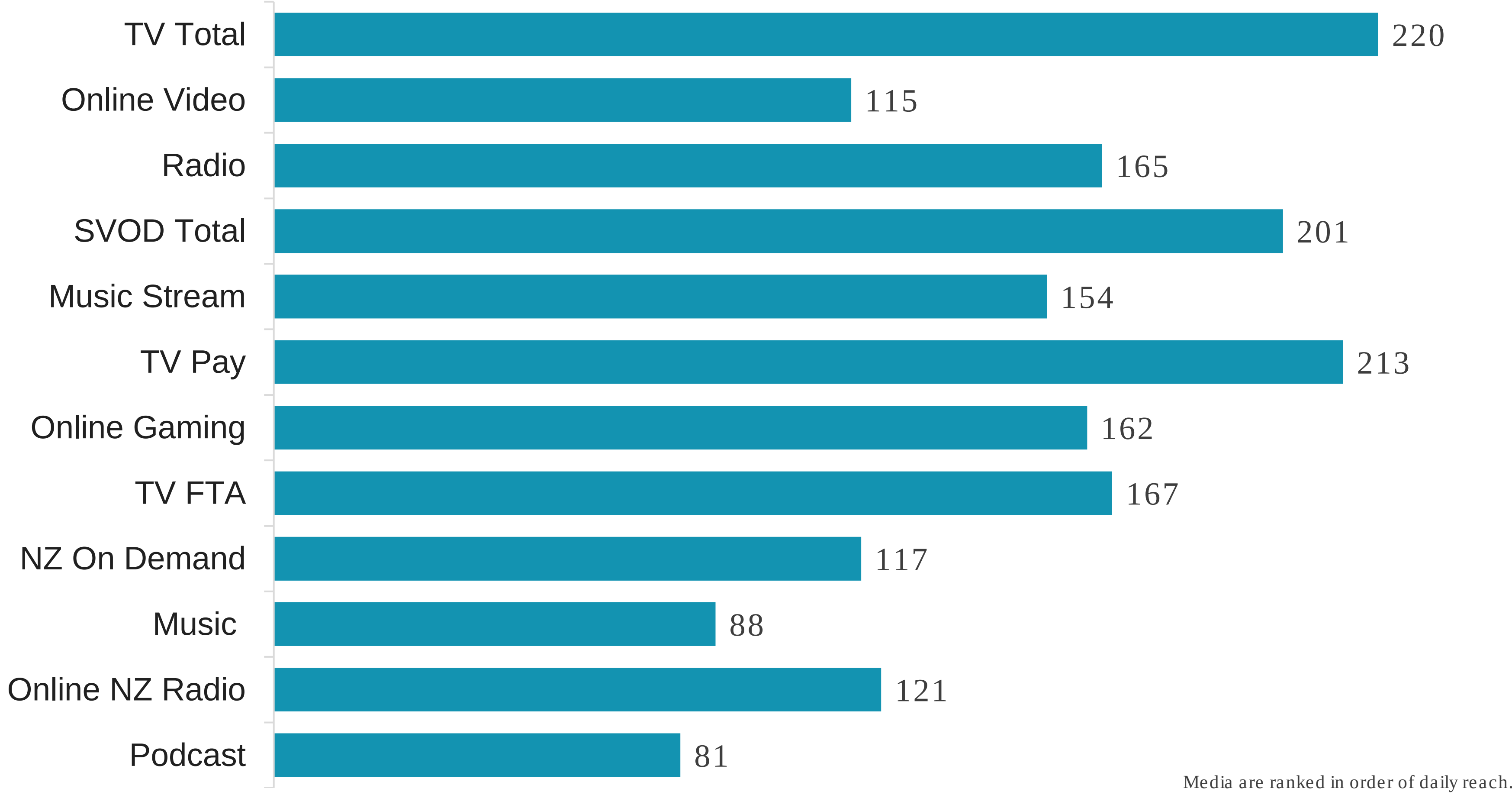
Podcasts are the only digital media not to show significant growth in time spent using since 2018.

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

This chart summarises the amount of time users of each media spend on those media per day (ie. zero viewing is not included). As such it is a measure of engagement rather than audience size across New Zealand. On this measure, despite similar audience sizes, engagement with online video (115 minutes) is significantly lower than TV (220 minutes).

Time spent consuming media 2020 – average minutes per day. Among all users of each media

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



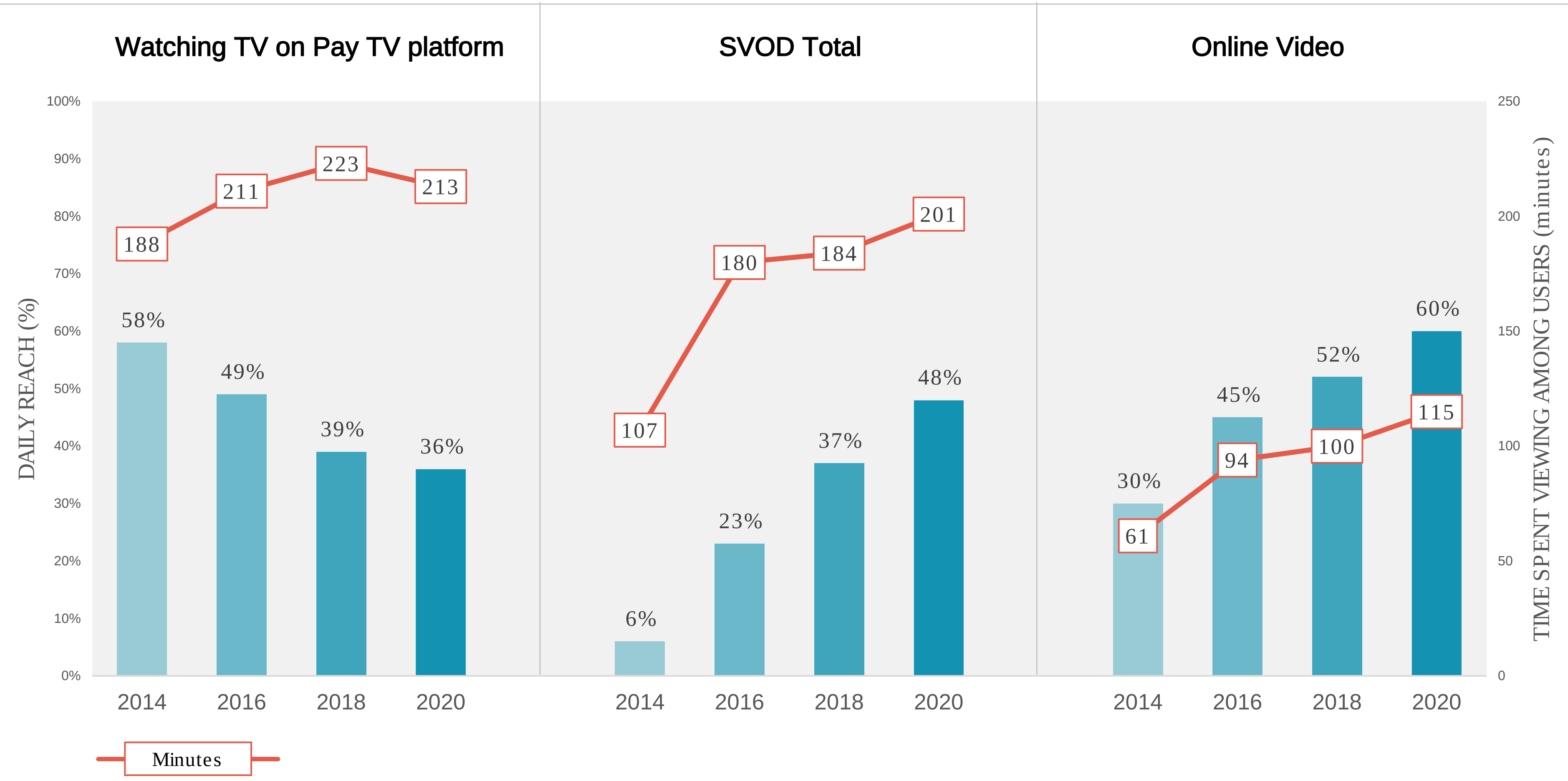
Media are ranked in order of daily reach.

- Linear TV shows the highest engagement among viewers (nearly 4 hours) – slightly down from 2018 (226 minutes).
- Heavier TV viewers continue to use a Pay TV platform (213 mins) than FTA (167 mins).
- SVOD has increased since 2018 (183 mins) to lag only slightly behind TV.
- Broadcast radio, online gaming, and music streaming are each consumed for more than 2½ hours by users.
- Online radio listeners tune in for two hours per day.

Base: All New Zealanders 15+: (2020 n=1,511).

Previous studies have shown linear TV audiences declining due to losing lighter viewers from the Pay TV platform and time spent viewing increasing among viewers. However the 2020 results show the first decline in time spent viewing among Pay TV viewers suggesting TV's loss of audience is no longer just from among lighter viewers.

Total daily reach and time spent among users over time – video media

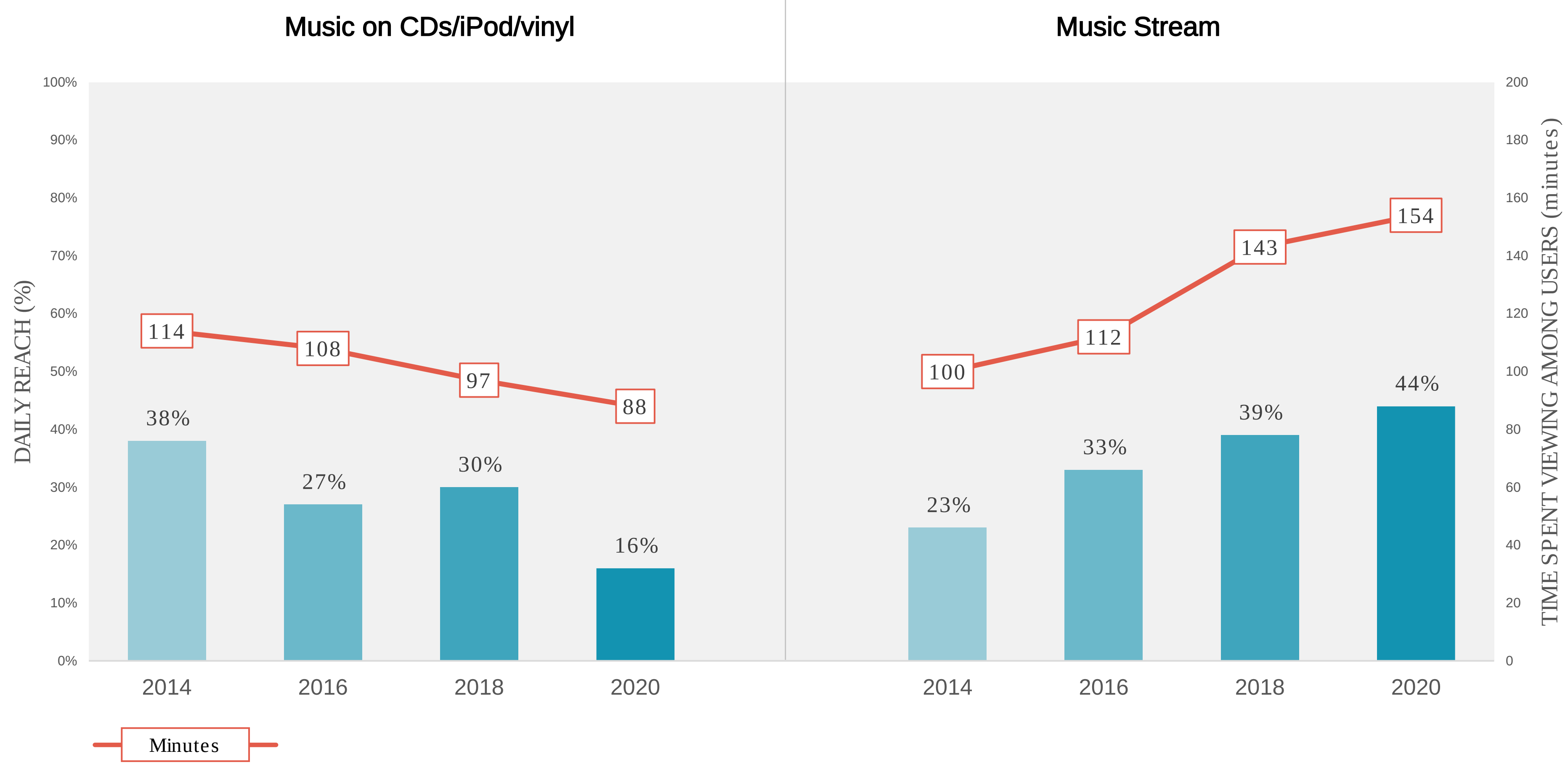


- After levelling off in 2018, time spent viewing SVOD and online video has increased in 2020, reinforcing the conclusion that heavier TV viewers are now dropping out of the TV audience.
- The absence of live sport during the survey period may also be contributing to the decline in time spent viewing among viewers on the SKY TV platform.

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

Changing music listening behaviour: The rapid change in the way New Zealanders listen to music continues.

Total daily reach and time spent among users over time - music



- The change in the way New Zealanders listen to music shows little sign of stabilising.
- Three times as many New Zealanders now listen to streamed music as opposed to physical formats, and streaming listeners do so for twice as long.

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

Media repertoires vary. A TV viewer is less likely to engage with other media. An on demand viewer is more likely to consume all video media (TV, SVOD, online video). There is a strong overlap in the audiences of SVOD, online video and music streaming. Radio listeners are more likely to also watch TV that day.

Repertoires of daily media | % of all New Zealanders 15+

Media watched yesterday (row %'s)	Linear TV	On demand	SVOD	Online Video	Radio	Music Streaming
Linear TV	-	30%	41%	52%	56%	36%
On demand	72%	-	65%	69%	48%	51%
SVOD	53%	35%	-	75%	43%	59%
Online Video	53%	30%	60%	-	44%	61%
Radio	69%	25%	41%	54%	-	38%
Music Streaming	51%	30%	64%	83%	43%	-

Example of how to read table: Of those who watched on demand yesterday, 72% also watched linear TV that day.

Which New Zealanders Are Driving Change?

The main differentiating factor influencing media consumption continues to be age and lifestage . However there are several secondary factors that also play a role in influencing media consumption.

- Primary Differentiator: Age/Lifestage

- Secondary factors:
  - Socio-economic level
  - Ethnicity
  - Region
  - Gender
  - Access to SKY TV and/or SVOD

- Full profiles of daily media consumption and access to devices and platforms by demographic variables are contained in the Appendix.

- The following charts summarise the complex dynamics of how different variables influence media consumption behaviour in 2020.

There continues to be a distinct generation gap in media consumption between younger and older New Zealanders. However as media consumption trends evolve that gap is becoming less strongly defined, and the age at which it occurs varies significantly by different media.

- In 2016 there was a stark divide at ages 40-45 between younger New Zealanders who were more likely to engage with digital media and older New Zealanders more likely to use traditional media.

- In 2018 that generation gap remained strong, especially for traditional media as younger New Zealanders continued to drop out of those media. However the generation gap had closed a little for digital media as older New Zealanders adopted those media in greater numbers.

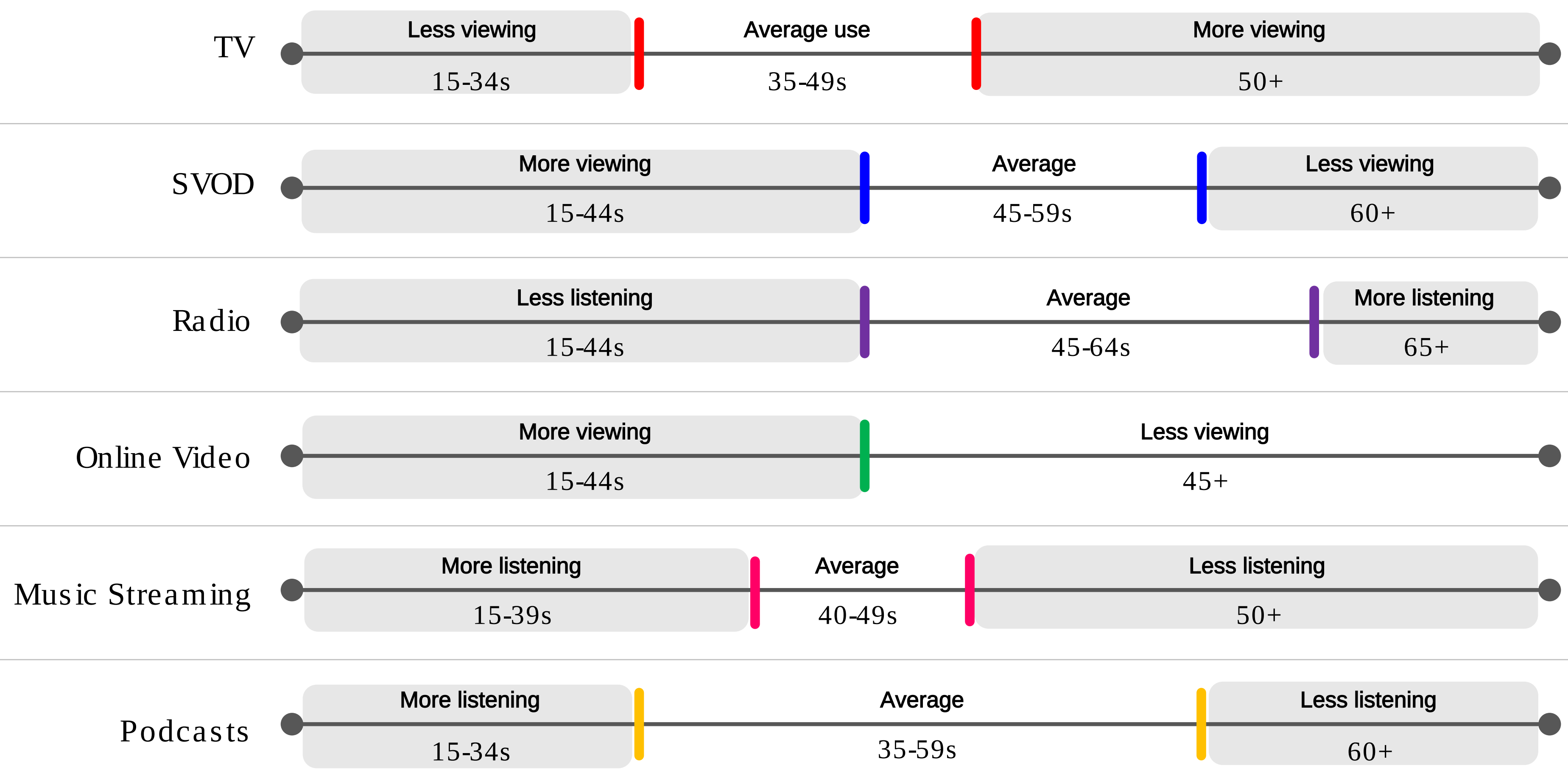
- In 2020 there is no longer a stark divide within a narrow age range delineating two types of audiences more and less likely to consume traditional or digital media. For most media it is now more accurate to say there are three generations of media consumers; a young audience where digital media dominates, a middle aged audience divided between traditional and digital media, and a much older audience among whom traditional media still dominates.

- This three generation landscape is a result of middle aged New Zealanders continuing to reduce their use of traditional media and adopting digital media in greater numbers.

- The ages which define these three audiences varies between media, and are summarised on the next page.

The ages of the three generations of media consumers vary by media, with the middle generation typically being defined between a broad age range of 35 and 59.

Defining daily media audiences by age



There are two exceptions to the three generations of media behaviour:

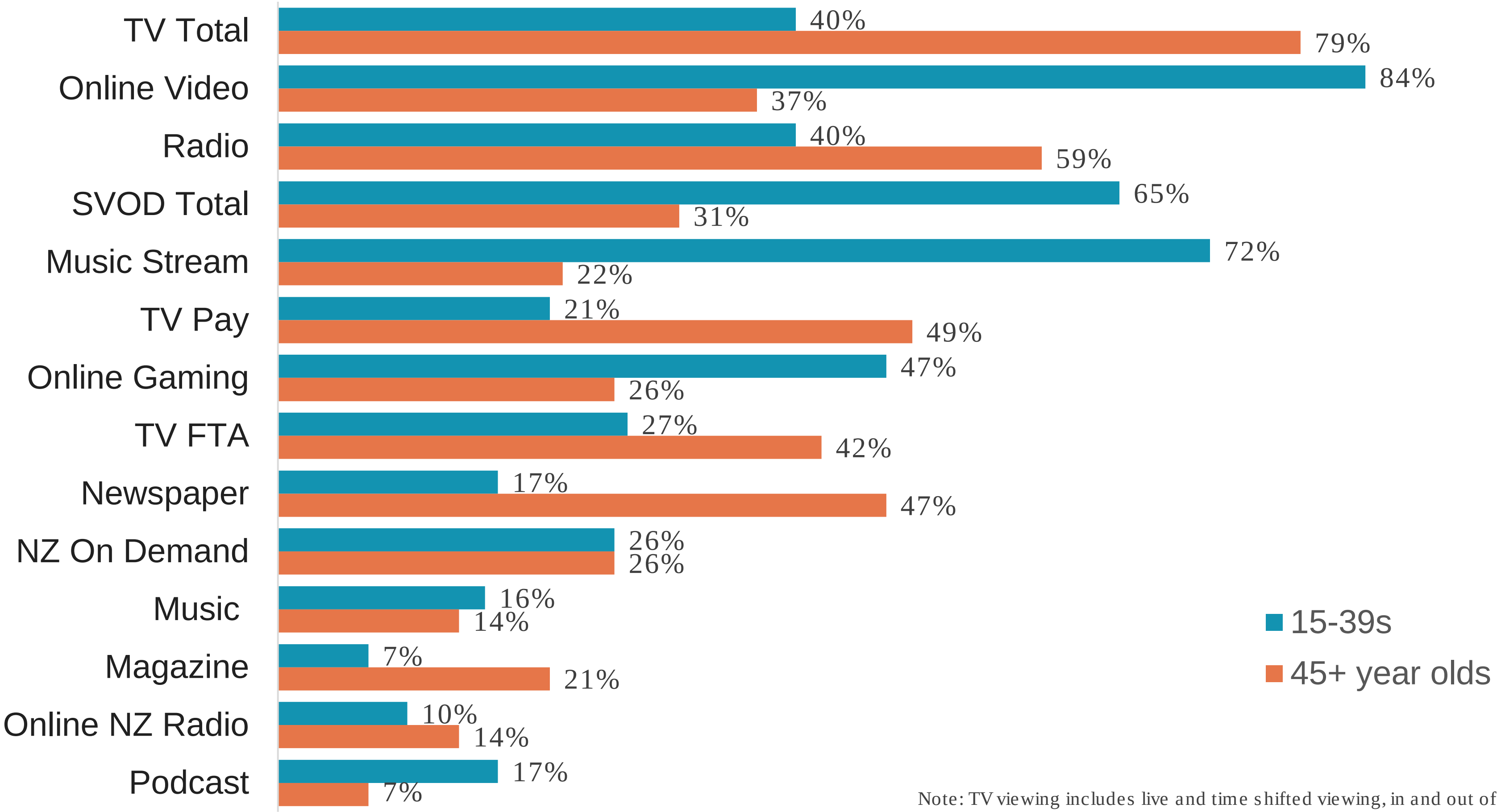
There is still a clear divide between younger and older New Zealanders at age 45 for online video;

The on demand audience is broad with no clear generation gap. The combination of TV based content and digital channel means this media appeals relatively equally to the younger, more digitally savvy, and the older, more traditional TV audience.

Despite the less clear divide in media behaviour between older and younger New Zealanders in 2020, the following chart shows how influential age, and consequently lifestage , is in influencing media behaviour. This difference becomes more extreme at the youngest (15 -24s) and oldest (65+) ends of the age range.

Daily reach of all media 2020 – 15-39s vs. 45+ year olds

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.



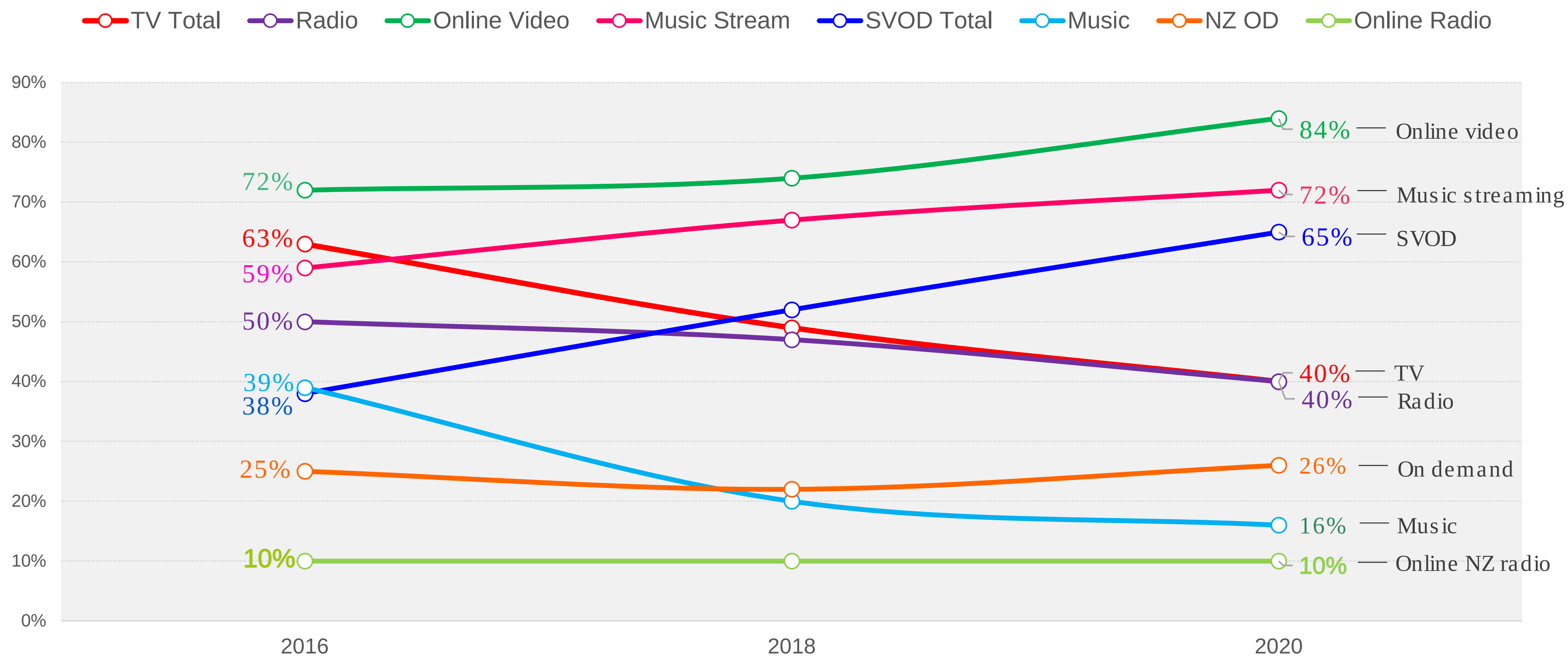
Note: TV viewing includes live and time shifted viewing, in and out of home.

- Among 15-39s, online video (84%), music streaming (72%) and SVOD (65%) are easily the most popular - followed by gaming (47%).
- Among 45+ year olds TV (79%), radio (59%) and newspapers (47%) are the most popular media on a daily basis.
- On demand (26%), music (physical formats) and online NZ radio are equally popular across these two age groups.

How is the media consumption of 15 -39 year old New Zealanders changing over time? Digital media now captures the vast majority of younger New Zealanders each day, with a minority tuning in to TV or radio.

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

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.



- Online video has attracted the biggest daily audience among 15-39s since at least 2016, and now reaches nearly all of this group each day.
- The cross-over point where digital media started attracting a bigger audience than traditional media occurred in 2018.
- Four in ten 15-39 year olds (40%) now consume TV and/or radio each day from nearly two thirds (63%) and one in two (50%) respectively in 2016.

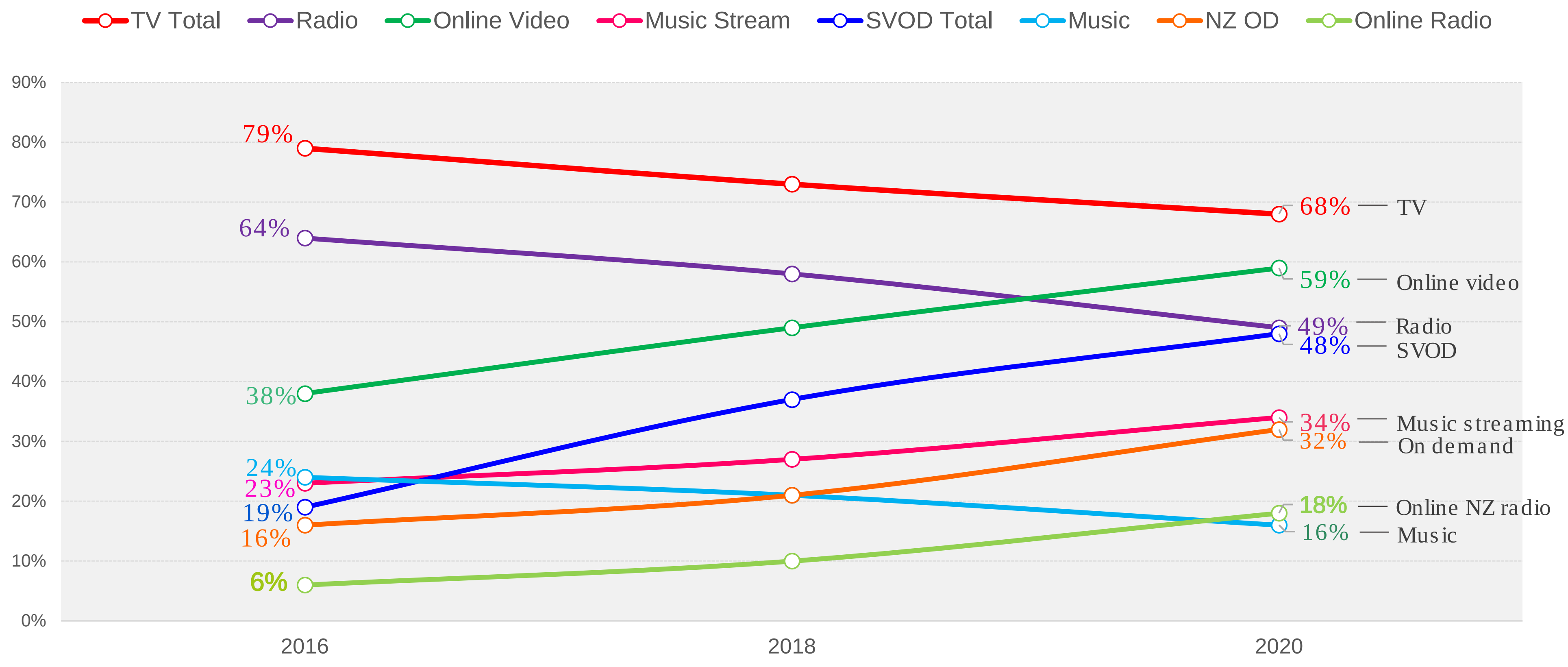
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All respondents: (2016 n=576; 2018 n=577; 2020 n=630).

How is the media consumption of 40 -59 year old New Zealanders changing over time? While TV still attracts the biggest daily audience among this age group, the consistent strong growth of online video and SVOD results in being the near the cross -over point where digital media over-takes the popularity of traditional media.

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

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.



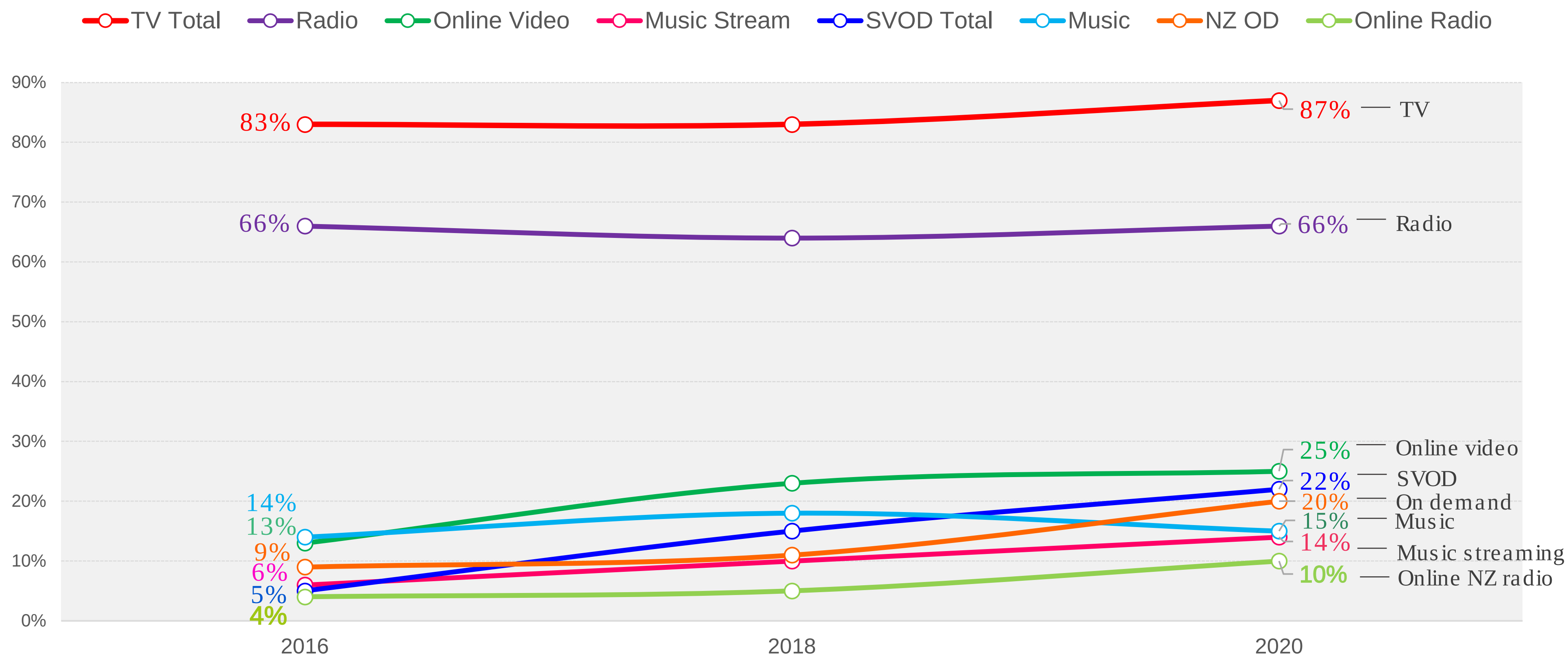
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

- Among 40-59 year olds, the growth of SVOD, online video and music streaming matches the growth rate of these media among younger New Zealanders (15-39s).
- TV still attracts the biggest audience among this age group but it is slowly declining, along with radio.
- Both on demand and online NZ radio have become more popular among this age group, with online radio over-taking music (physical formats) since 2018.

How is the media consumption behaviour of 60+ year old New Zealanders changing over time? Among this older demographic, traditional media remains strong and is not declining. Digital media is yet to start bridging the gap to traditional media among this audience.

Daily reach of media over time – 60+ year olds

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.



- The vast majority of 60+ year old New Zealanders tune in to TV and/or radio each day and this audience has not declined since 2016.
- Online video is the third most popular media but only reaches one in four and this has not increased since 2016.
- SVOD attracts more than one in five 60+ New Zealanders, and this media is showing significant growth - from 5% in 2016.
- Similarly on demand is also growing in popularity among 60+ year olds.

Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All respondents: (2016 n=363; 2018 n=377; 2020 n=418).

The generation gap in media consumption is also reflected in the varying media behaviour of New Zealanders at different lifestages .

The trends among younger New Zealanders are also reflected among…	The trends among older New Zealanders are also reflected among…
Students	Retirees
Flatting households	Empty Nesters
Young singles and double income couples without children	1-2 person homes
Families with pre-school children	
4+ person homes	

Secondary factors also influence the consumption of media and access to devices and platforms. These trends are summarised below, with a full breakdown contained in the Appendix.

Socio-economic level*

- Higher socio-economic groups are more likely to use on demand, SVOD and podcasts each day. They are less likely to play online gaming. This group is also more likely to have access to SKY TV, a PVR, a TV, a smart TV connected to the Internet, and Chromecast or similar.

- Conversely lower socio-economic groups are less likely to use on demand, SVOD, and radio. This group have less access to SKY TV, a smart TV connected to the Internet, or Chromecast or similar.

Ethnicity

- New Zealanders of Asian descent are significantly less likely to watch TV (28% daily reach) or listen to broadcast radio (37%), and more likely to watch online video (86%) and listen to streamed music (66%).

- Asian ethnicities are significantly less likely to have access to a TV (55%) or a radio (35%), and just 12% have SKY TV.

- Māori are more likely to watch on demand (32%) and listen to streamed music (54%) each day. They are also more likely to have access to SKY TV (47%), a PVR (38%), or a games console (38%).

- Pasifika are more likely to use online video (77%), listen to streamed music (63%), and have access to a games console (35%).

* For the purposes of this analysis, socio-economic level is a term used to summarise the trends evident in media behaviour among different income and occupation groups.

Secondary factors also influence the consumption of media and access to devices and platforms. These trends are summarised below, with a full breakdown contained in the Appendix.

Region

- Aucklanders are more likely to engage with digital media overall than the rest of the country.

- In particular this region is more likely to watch SVOD (52%), watch online video (68%) and listen to streamed music (50%) each day. They are less likely to watch TV (51%).

Gender

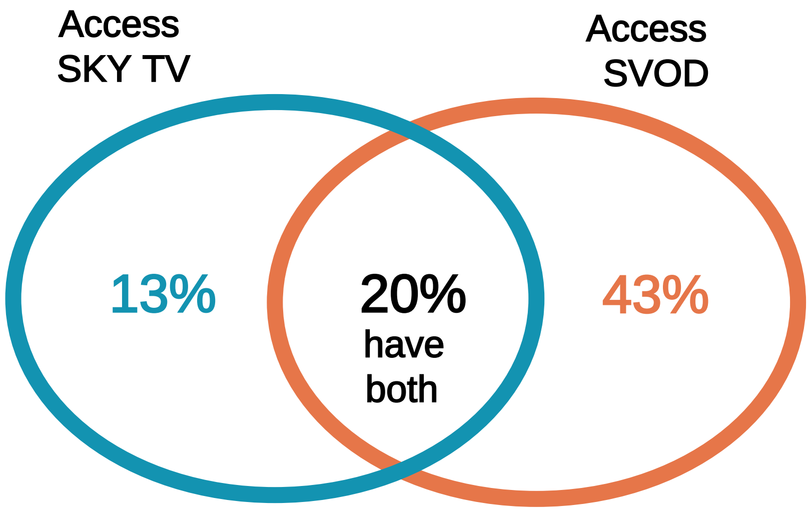
- Males are more likely than females to watch online video (66%), listen to streamed music (48%), and listen to podcasts (15%).

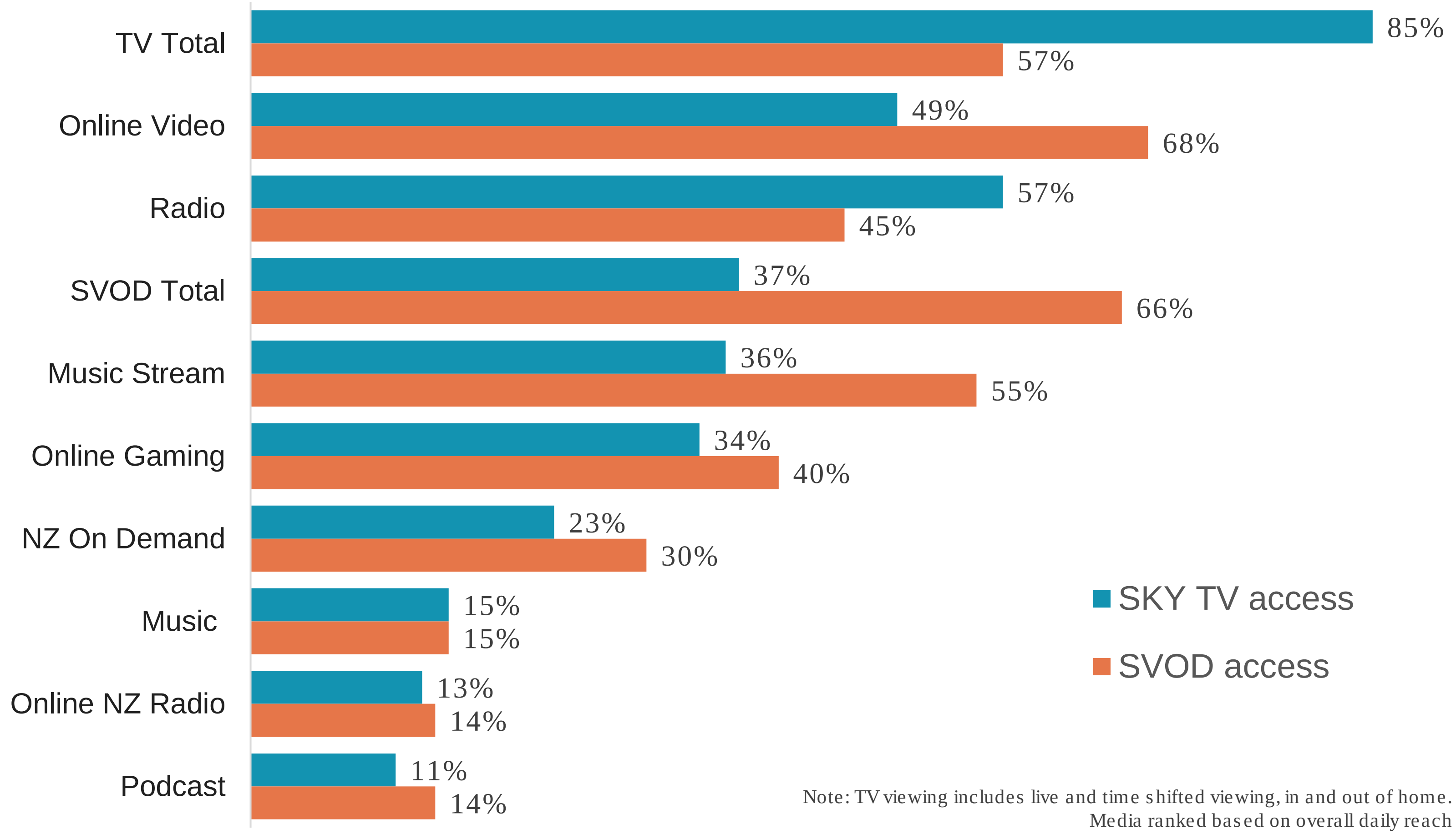
- Females are more likely than males to watch on demand each day (29%).

Twice as many New Zealanders have access to SVOD as SKY TV, and most of those who can access SKY TV also have access to at least one SVOD provider. Access to these platforms significantly influences media behaviour with TV continuing to attract the biggest audience in a SKY home, and SVOD and online video more popular in an SVOD home.

Daily reach of all media 2020 – SKY TV vs. SVOD platforms

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.





Note: TV viewing includes live and time shifted viewing, in and out of home. Media ranked based on overall daily reach

Base: All New Zealanders 15+ (n=1,511)

Base: All who access SKY TV (n=493), all who access SVOD (n=954)

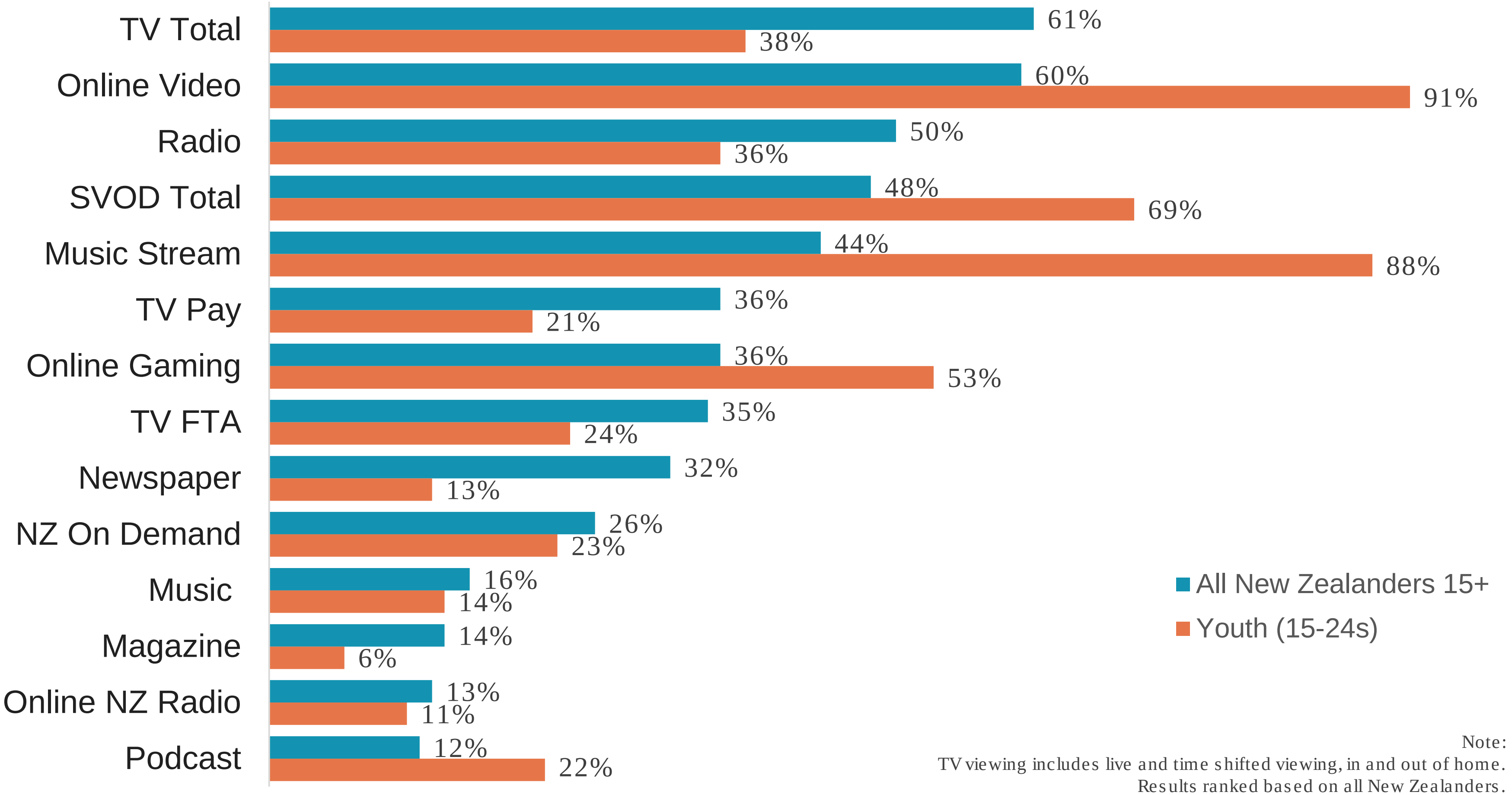
Hard To Find Audiences

Youth (15-24s)
Māori
Pasifika
Asian

This chart shows how different the media behaviour of 15 -24s is from the average in 2020. Nearly all 15-24s watch online video or listen to streamed music each day. Seven in ten watch SVOD, and more than one in two play online gaming. TV and radio are the most popular traditional media but these media reach fewer than four in ten 15 -24s each day.

Daily reach of all media 2020 – Youth (15-24s)

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.



Note:
TV viewing includes live and time shifted viewing, in and out of home.
Results ranked based on all New Zealanders.

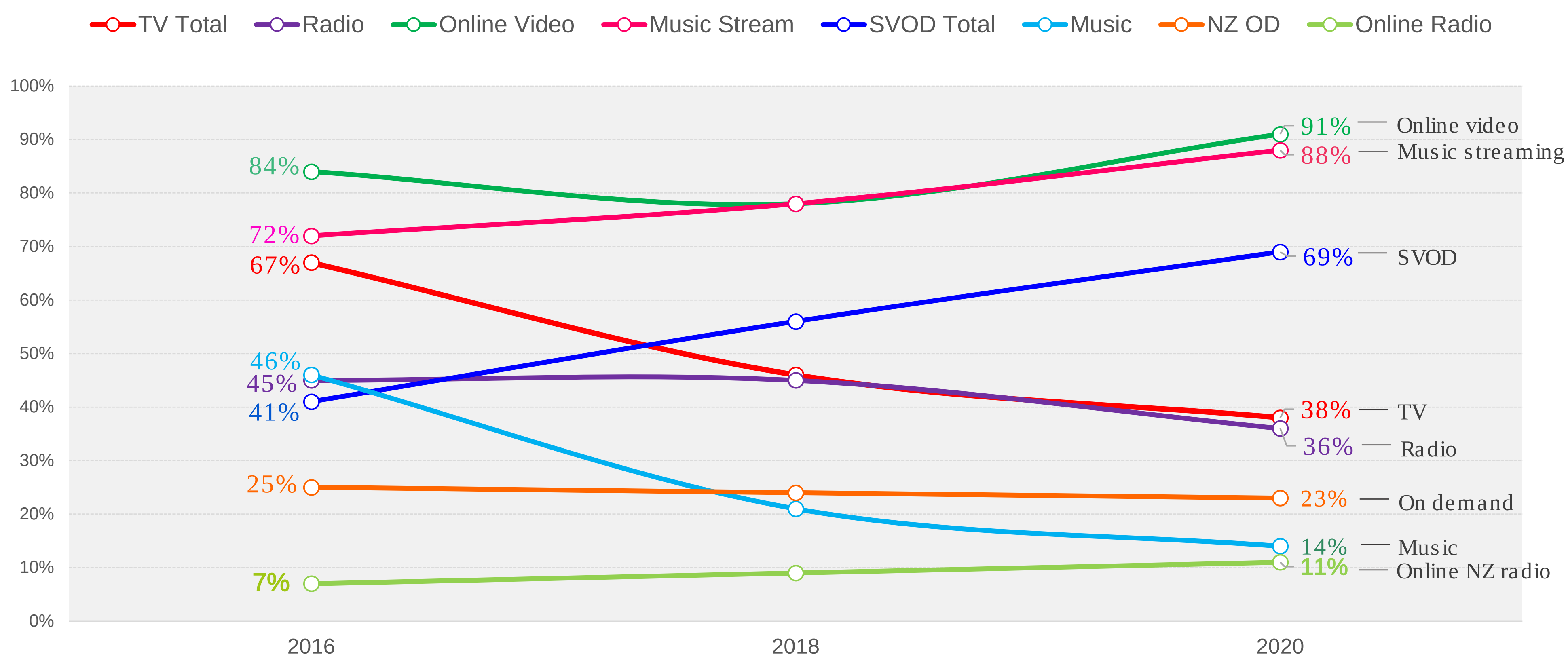
On demand, music on physical formats and online NZ radio are the only media where the consumption patterns of 15-24s are similar to that of the general population.

Base: All New Zealanders 15+ (n=1,511); All 15-24s (n=262).

Music streaming and SVOD show consistent growth among 15 -24 year olds since 2016, whereas TV, radio and music (physical formats) continue to decline. There is now a large difference in audience sizes between the leading three digital media and traditional media. on demand and online NZ radio are steady over time.

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

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.



The cause of the apparent decline in online video audiences among 15-24s in 2018 is unknown.

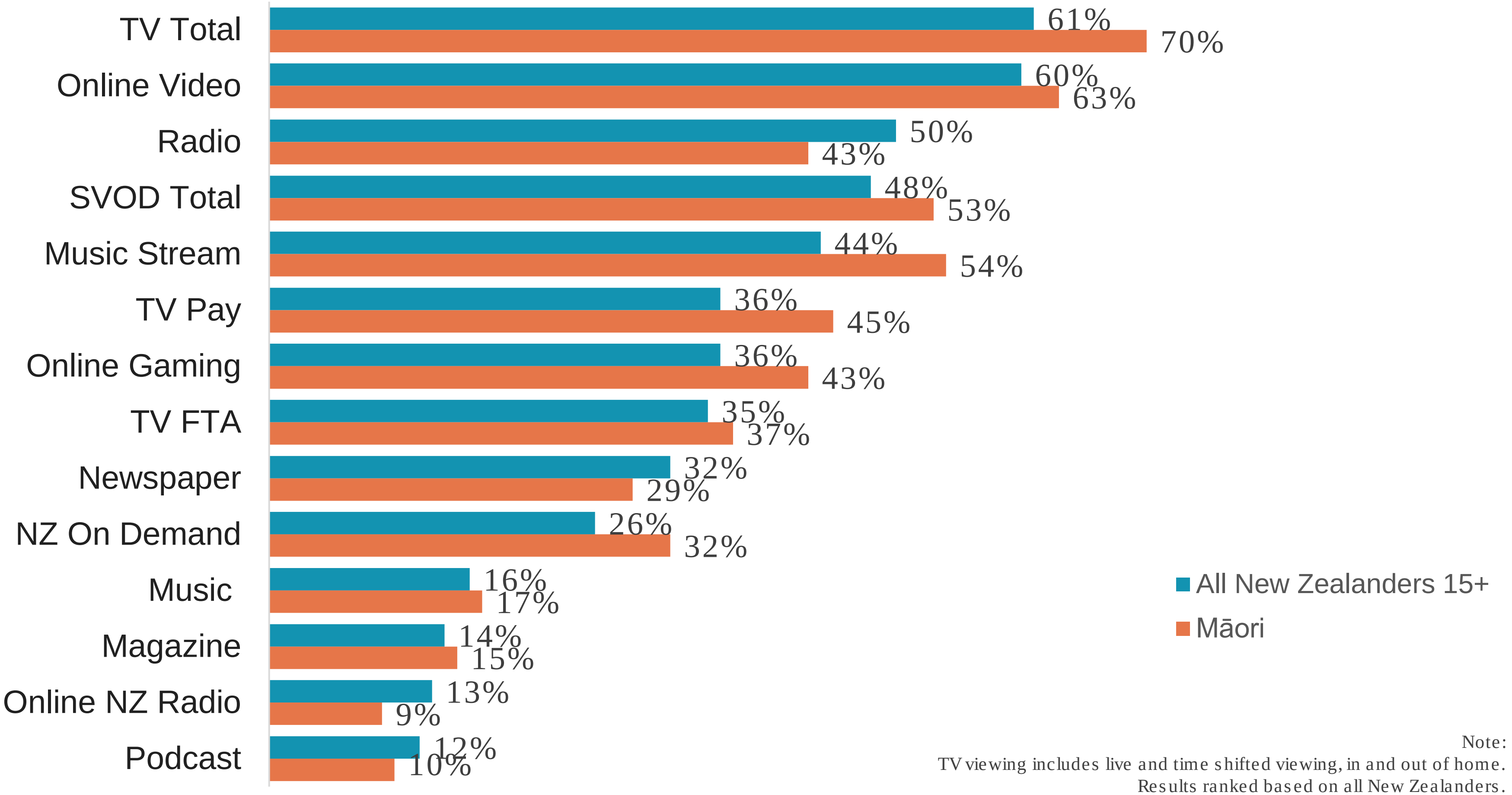
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All 15-24s: (2016 n=249; 2018 n=264; 2020 n=262).

There is similarity in the media consumption behaviour of Māori and all New Zealanders 15+. Overall Māori consume media in greater numbers than all New Zealanders 15+ with the exception of radio, online radio and podcasts.

Daily reach of media 2020 – Māori

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.



Note:
TV viewing includes live and time shifted viewing, in and out of home.
Results ranked based on all New Zealanders.

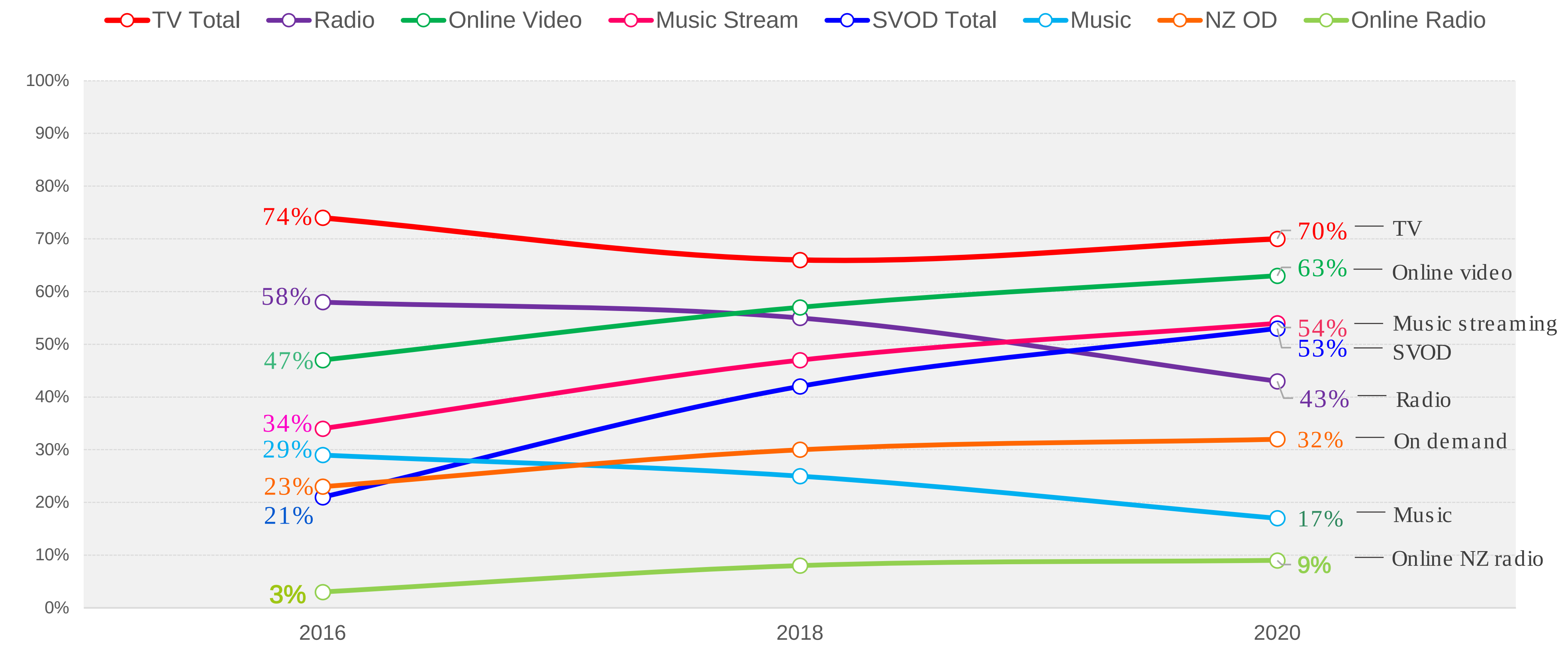
- TV is the most popular media, attracting seven in ten Māori each day, followed by online video.
- SVOD and streamed music are next most popular, each attracting slightly more than one in two Māori each day.
- Radio and online gaming both reach four in ten Māori each day.

Base: All New Zealanders 15+ (n=1,511); All Māori (n=232).

The popularity of TV among Māori increased slightly since 2018 – unlike radio and music (physical formats) which have declined sharply over the same period. Online video, streamed music and SVOD continue to grow in popularity among Māori.

Daily reach of media over time – Māori

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



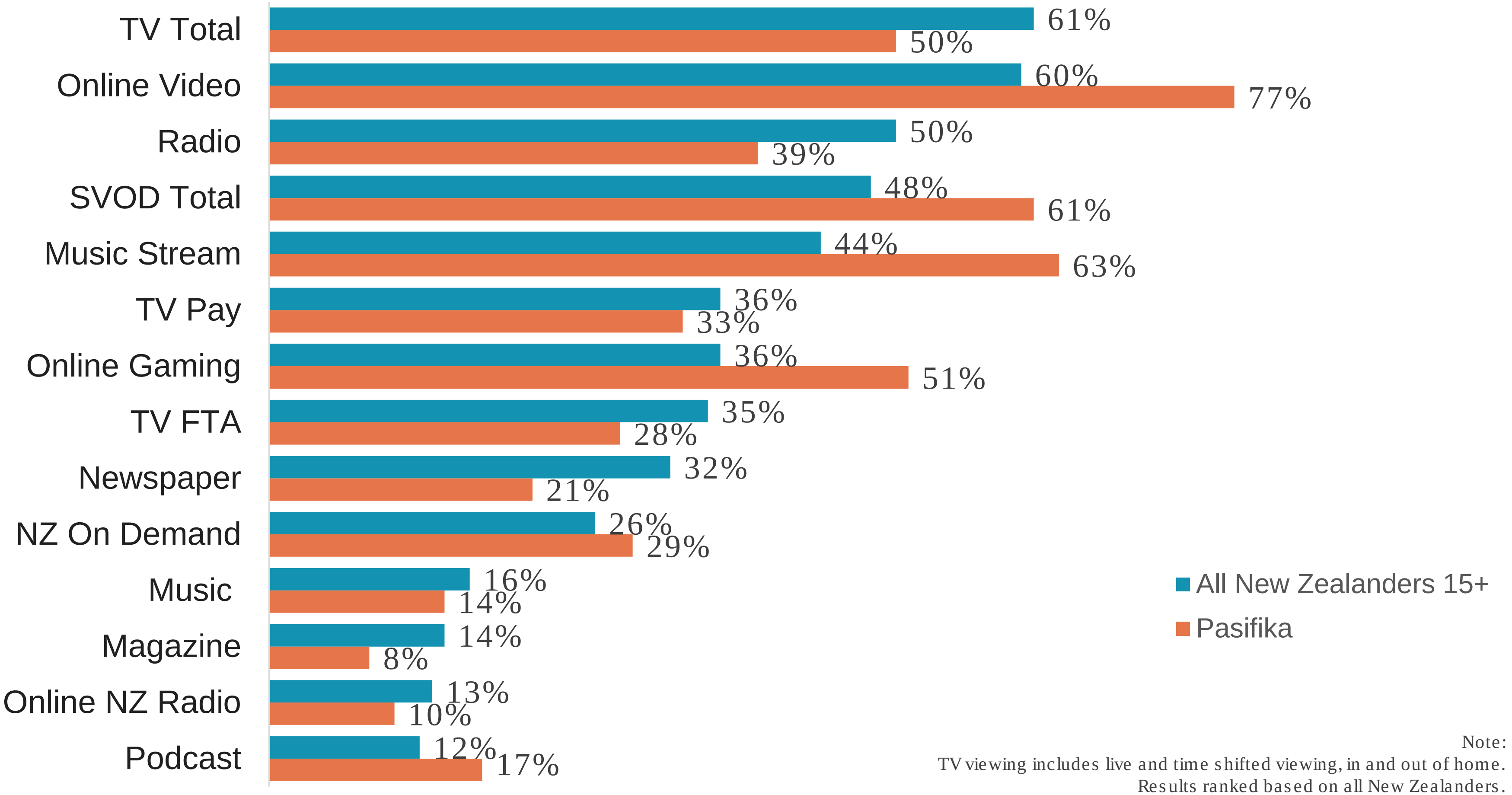
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All Māori: (2016 n=195; 2018 n=202; 2020 n=232).

The overall media behaviour among Pasifika more closely resembles the behaviour of youth with online video reaching nearly eight in ten Pasifika each day, and streamed music and SVOD reaching six in ten. Online gaming and TV are next most popular reaching one in two Pasifika daily.

Daily reach of all media 2020 – Pasifika*

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.



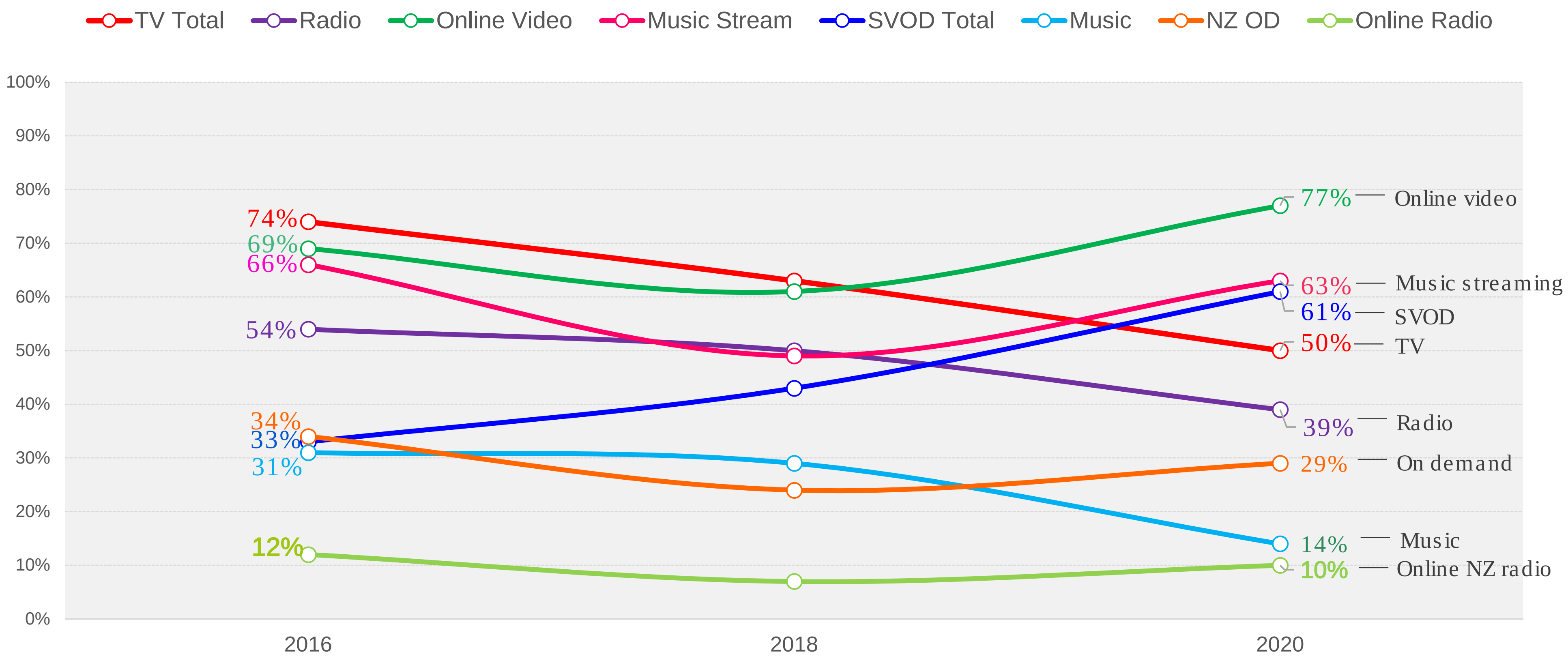
Note:
TV viewing includes live and time shifted viewing, in and out of home.
Results ranked based on all New Zealanders.

Base: All New Zealanders 15+ (n=1,511); All Pasifika* (n=110). *Caution: small sample size

Online video, streamed music and SVOD have all shown significant growth since 2018 among Pasifika, while audiences on TV, radio and music (physical formats) have all declined over the same period.

Daily reach of all media over time – Pasifika*

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.



The movement of the trend lines is more volatile among Pasifika due to the smaller sample size of this group in the study.

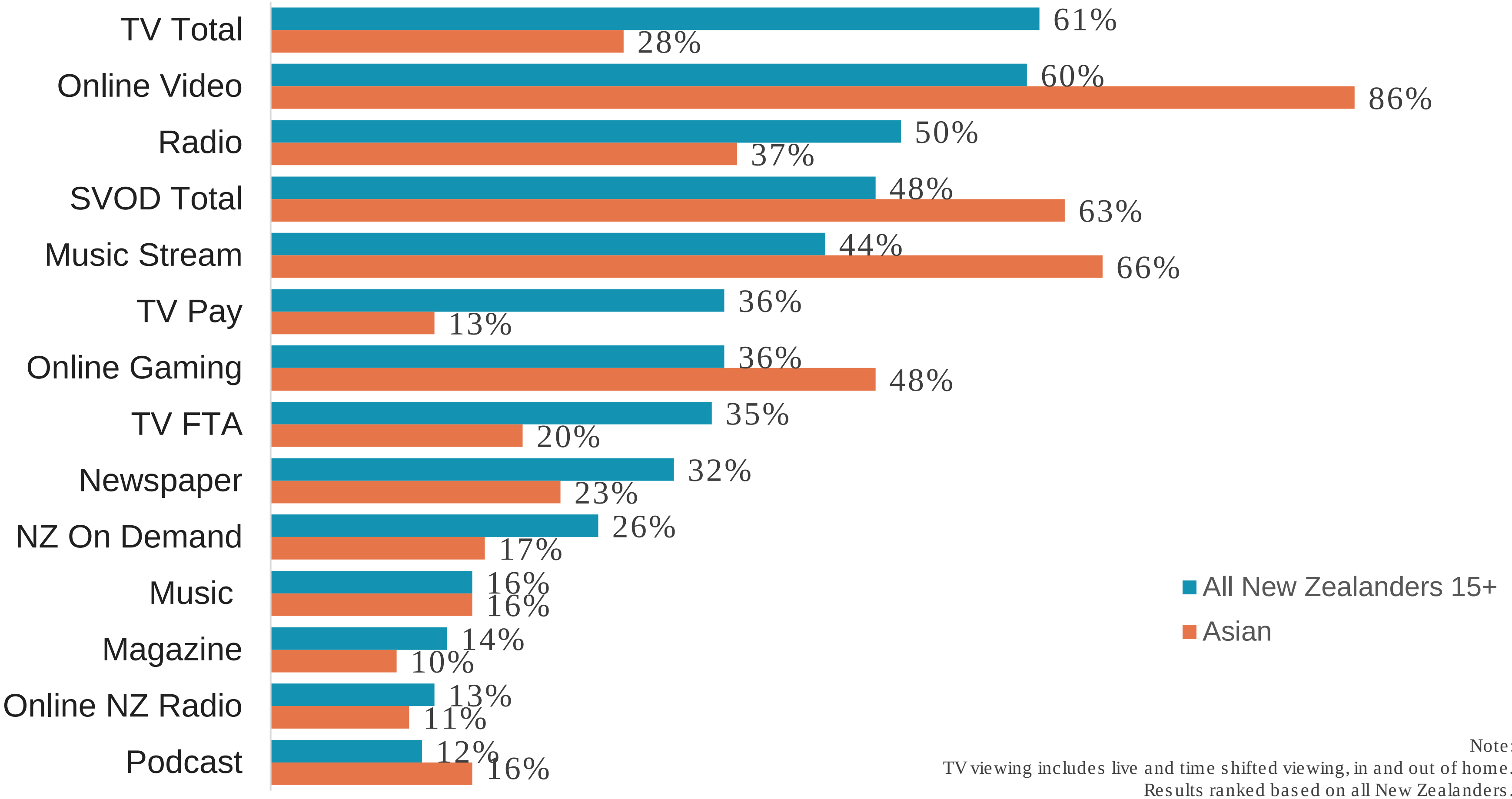
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All Pasifika*: (2016 n=83; 2018 n=86; 2020 n=110). * Caution: small sample sizes

Perhaps the biggest differences in audience behaviour compared to overall New Zealanders 15+ can be seen among Asian New Zealanders – particularly in terms of this group's low incidence of TV viewing. In addition nearly nine in ten watch online video each day and two thirds listen to streamed music or watch SVOD each day. Nearly one in two play online games.

Daily reach of all media 2020 – Asian

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.



Note:
TV viewing includes live and time shifted viewing, in and out of home.
Results ranked based on all New Zealanders.

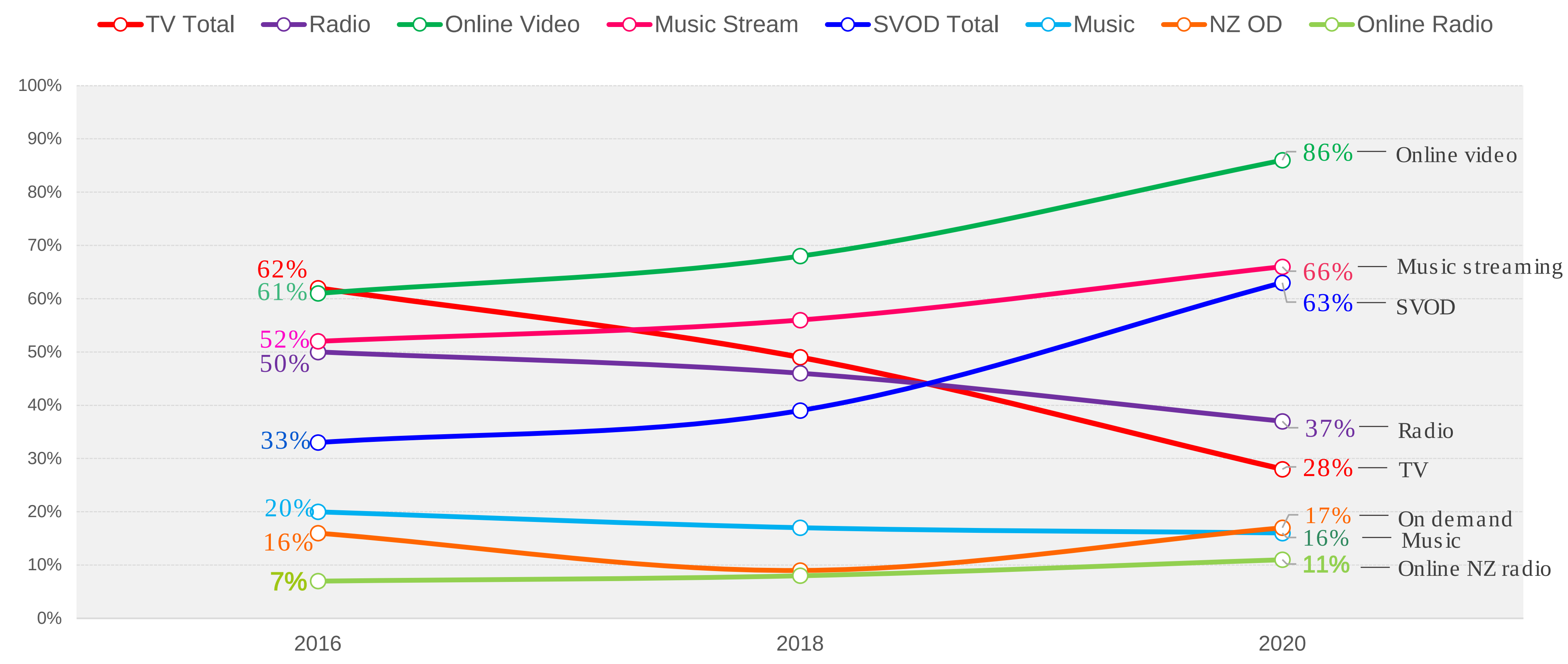
- Just 28% of Asian New Zealanders watch TV each day.
- This perhaps impacts on the smaller audience watching on demand as well.
- TV viewing is particularly low on the Pay TV platform – driven by just 12% of this group having access to SKY TV.

Base: All New Zealanders 15+ (n=1,511); All Asian (n=215).

From the most popular media among Asian New Zealanders in 2016, the proportion watching TV has declined sharply to fifth most popular and below radio in 2020. SVOD and to a lesser extent online video have grown significantly since 2018 with digital media now significantly more popular than traditional media among Asian New Zealanders.

Daily reach of all media over time – Asian

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.



The movement of the trend lines is more volatile among Pasifika due to the smaller sample size of this group in the study.

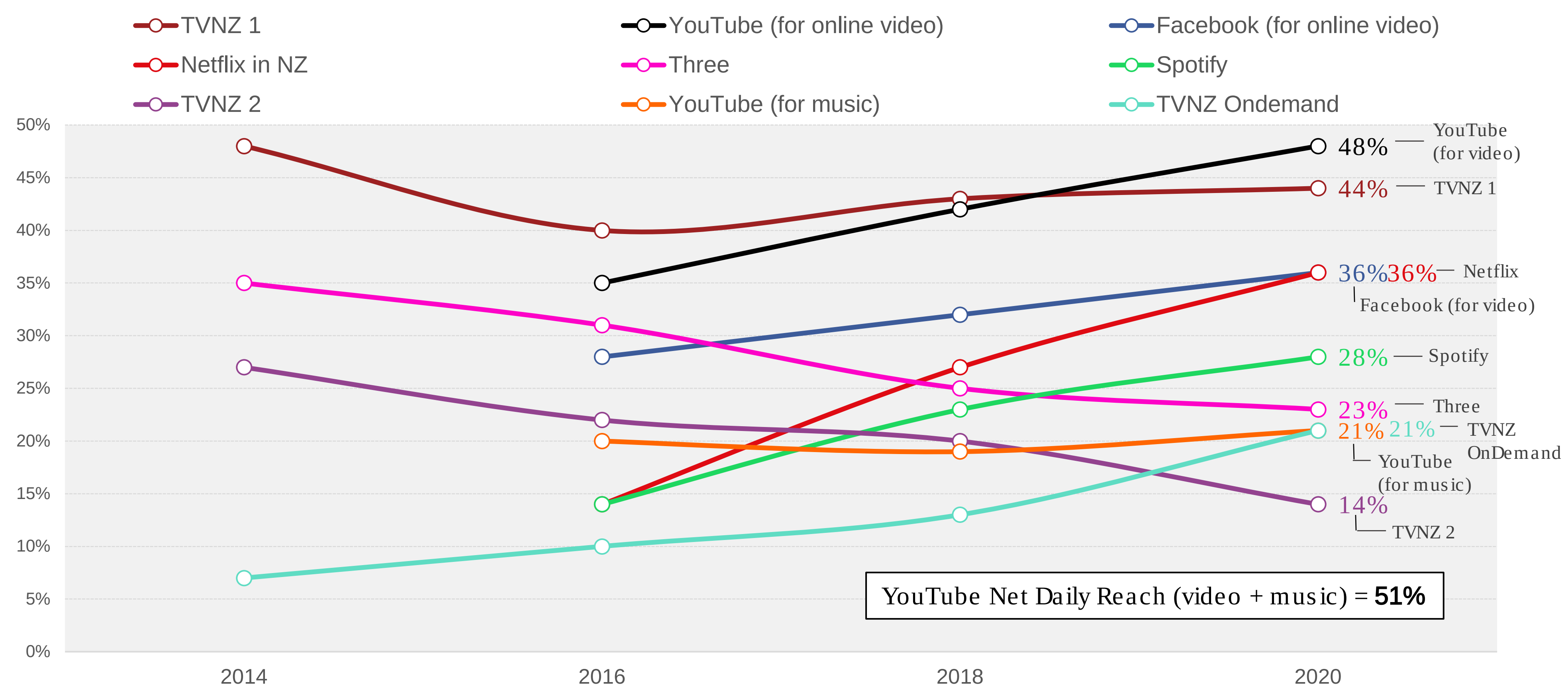
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Daily Media Consumption By Channel, Site & Station

YouTube is now the single most popular site, station or channel, overtaking TVNZ 1 and reaching one in two New Zealanders each day. TVNZ 2 and Three are the only other traditional media providers in the top sites, channels and stations, and both have declined since 2018. Netflix, Spotify, Facebook (for video) and TVNZ OnDemand have all increased significantly since 2018.

Most popular channels, sites & stations – all New Zealanders 15+

Q: Which of the following did you use yesterday?



Next five:
- Stuff (video) 12%
- NZ Herald (video) 11%
- RNZ (National) 11%
- Prime 9%
- Newstalk ZB 9%

Most YouTube use is for video rather than listening to music.

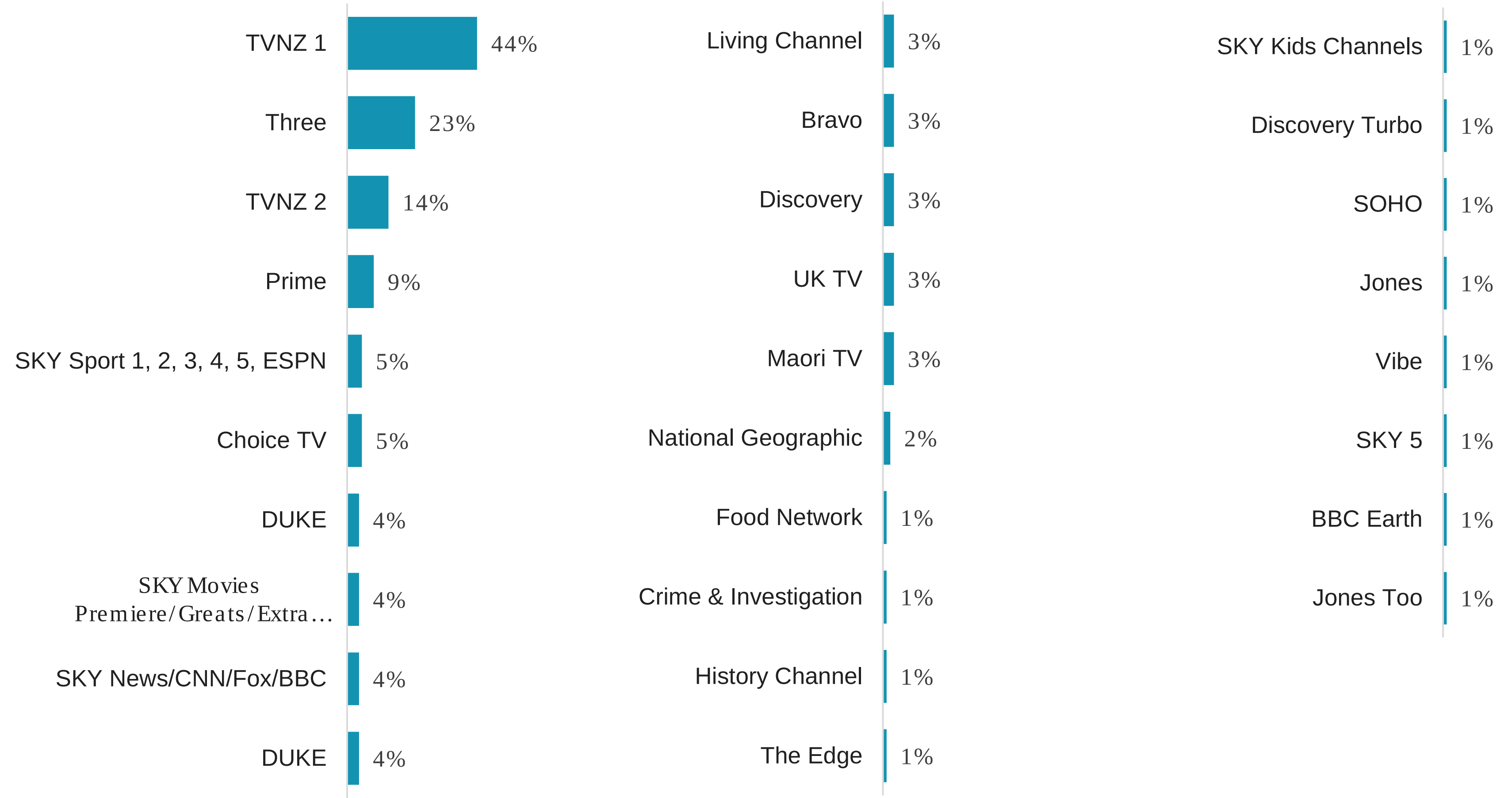
In fact just 3% of YouTube's total daily reach is people who only listen to music on this site.

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

TVNZ 1 continues to attract the biggest daily audience on TV, followed by Three and TVNZ 2. There continues to be a long tail of TV channels, mainly on the SKY platform, that attract a small audience each day

Daily reach of TV channels 2020 – all New Zealanders 15+

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



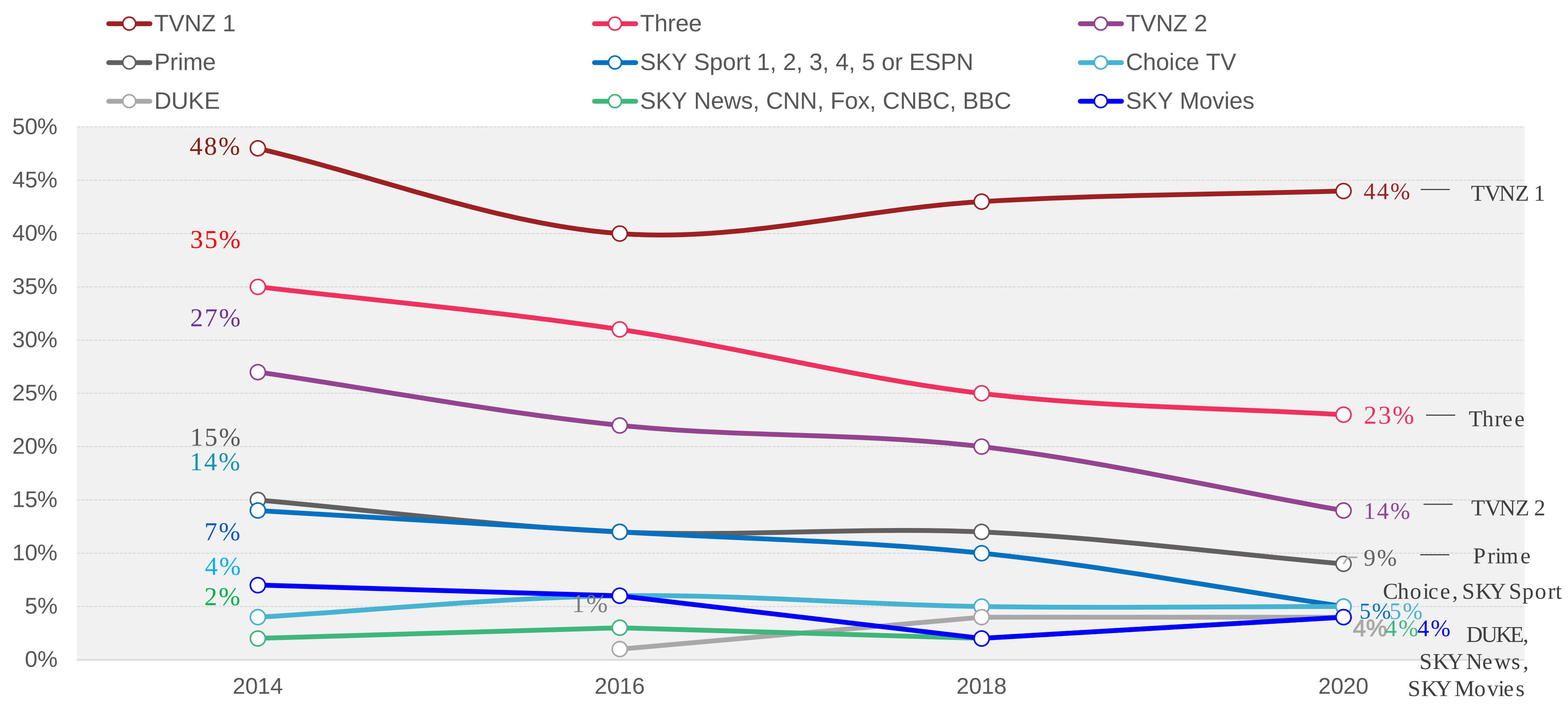
- TVNZ 1's audience is more likely to be aged 55+ (70% reach) or living in SKY homes (60%).
- Three's daily audience is slightly broader with 45+ year olds (32%) more likely to watch each day.
- TVNZ 2's audience is strongest among 40-54 year olds (21%), families with school aged kids (24%) and solo parents (29%).

Base: All New Zealanders 15+: (2020 n=1,511).

Despite the decline of linear TV overall, TVNZ 1's daily audience is stable since 2018 while nearly all other TV channels have declined. TVNZ 1's stability will be driven in part by New Zealanders tuning in to the daily Covid 19 updates during the survey period (see later chart).

Daily reach of TV channels (4% reach and over)– all New Zealanders 15+

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



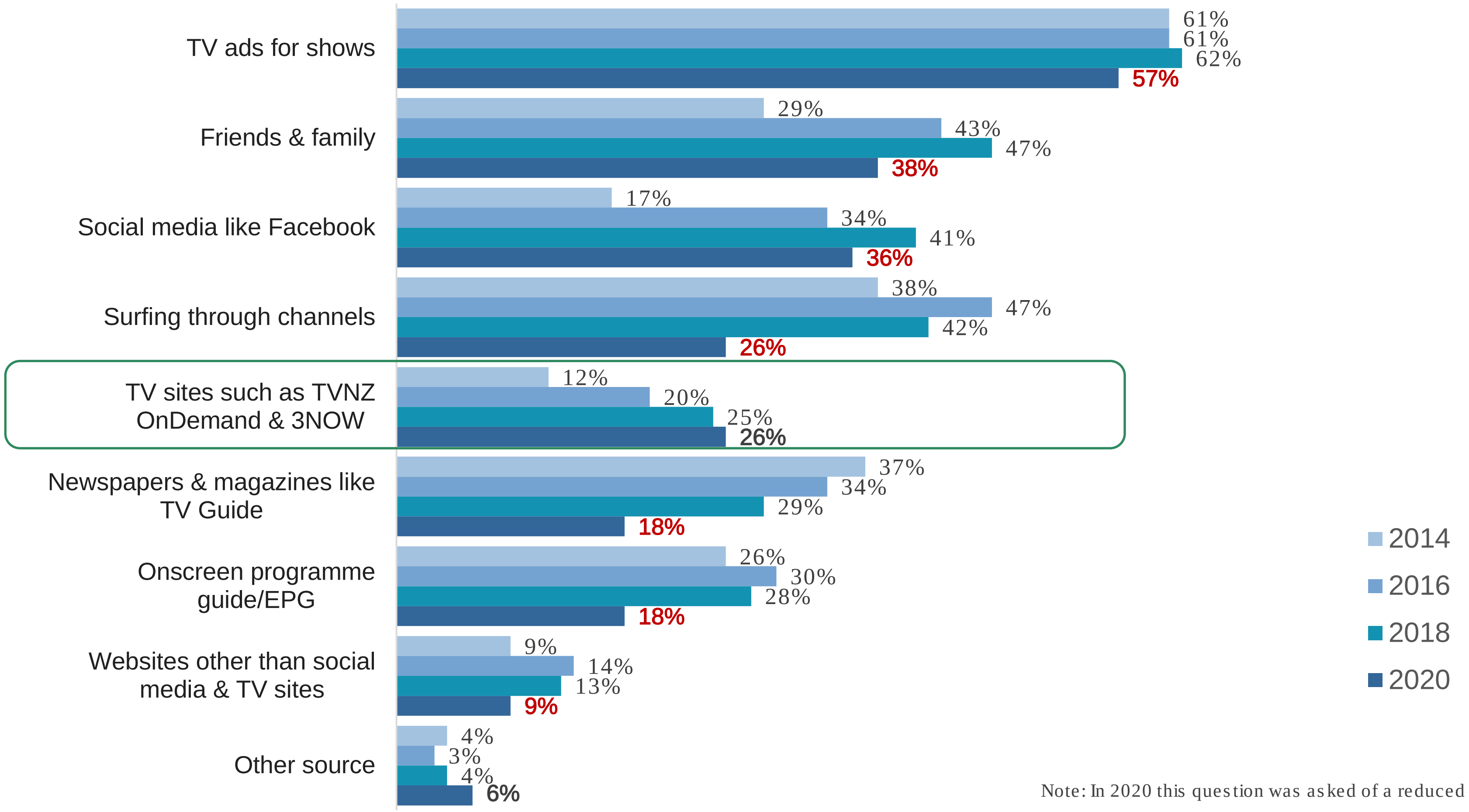
- TVNZ 2's daily reach has declined significantly since 2018 from 20% to 14% in 2020.
- SKY Sport has also declined, however this decline will be driven by the absence of sport during the survey period.

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

Promos on TV remain the primary source of information about NZ made TV shows, followed by word of mouth and social media. However as TV audiences decline overall, usage of nearly all sources of information have also declined – particularly surfing through channels, newspapers/ magazines and the EPG. The exception is on demand sites reflecting this media's audience growth.

How people become aware of NZ made TV shows – all New Zealanders 15+

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



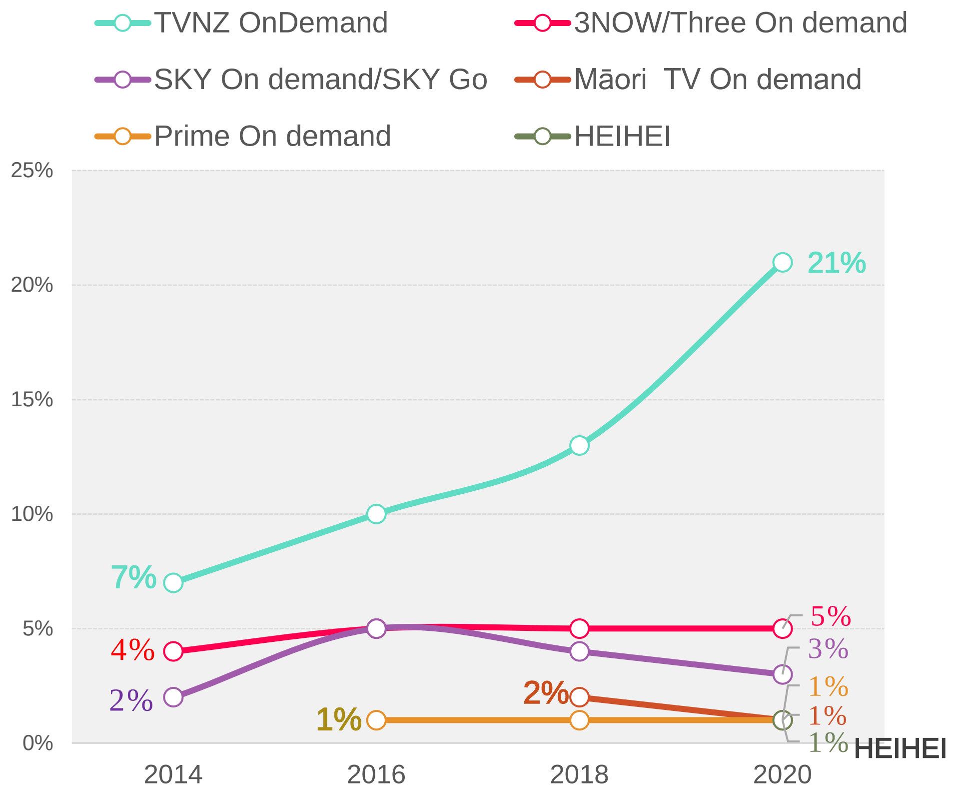
Note: In 2020 this question was asked of a reduced base size of n=1,053.

- Until 2020, friends and family and social media have shown consistent growth in influence in terms of how New Zealanders find out about NZ made TV shows.
- The 2020 study shows the first decline in these sources and suggests there is less social talk about NZ made TV shows than in 2018.

TVNZ OnDemand is the most popular site and growth in its daily audience has accelerated since 2018, now reaching more than one in five New Zealanders. Other sites' audiences are stable. on demand remains a source of catch up for most, but using it as a primary source of content continues to grow – particularly among 15 -24s, 52% of whom use it as a primary source of content.

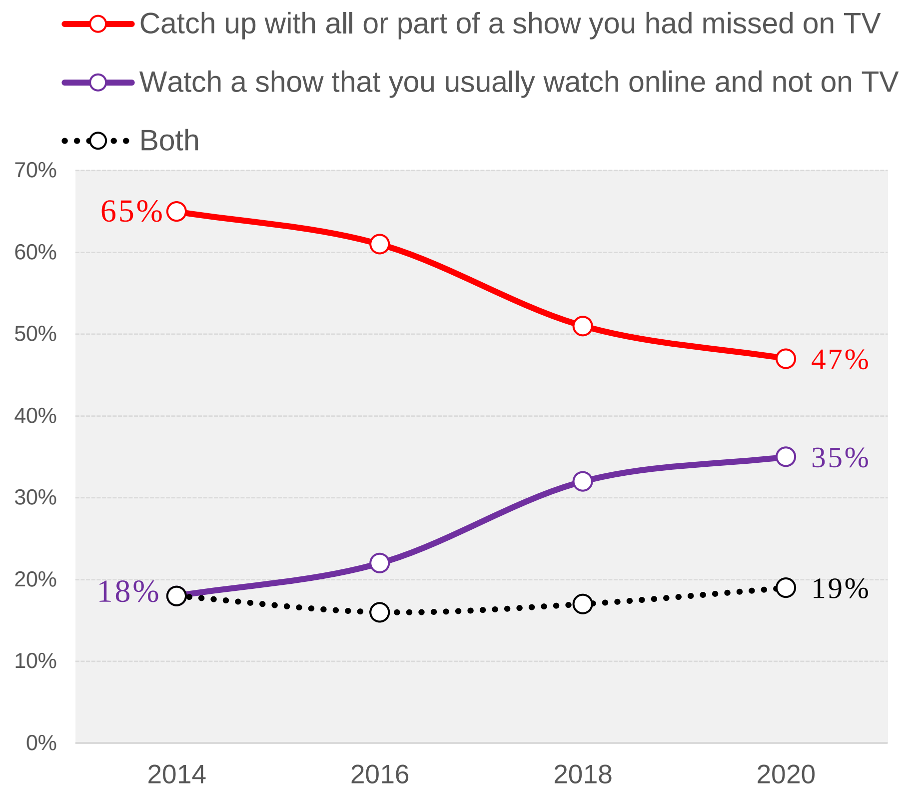
Daily reach of on demand sites – all New Zealanders 15+

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



Reason for using on demand – all New Zealanders 15+

Q: Thinking about when you used TVNZ, 3Now, Prime or SKY On demand yesterday, did you use it to..?



- The profile of the on demand audience is relatively broad, appealing to both older TV audiences and younger digital audiences.
- Higher socio-economic groups are more likely to view on demand, and TVNZ OnDemand viewers skew towards both females and higher socio-economic groups.
- The incidence of PVRs is declining which may result in the proportion of use for catch up remaining high.

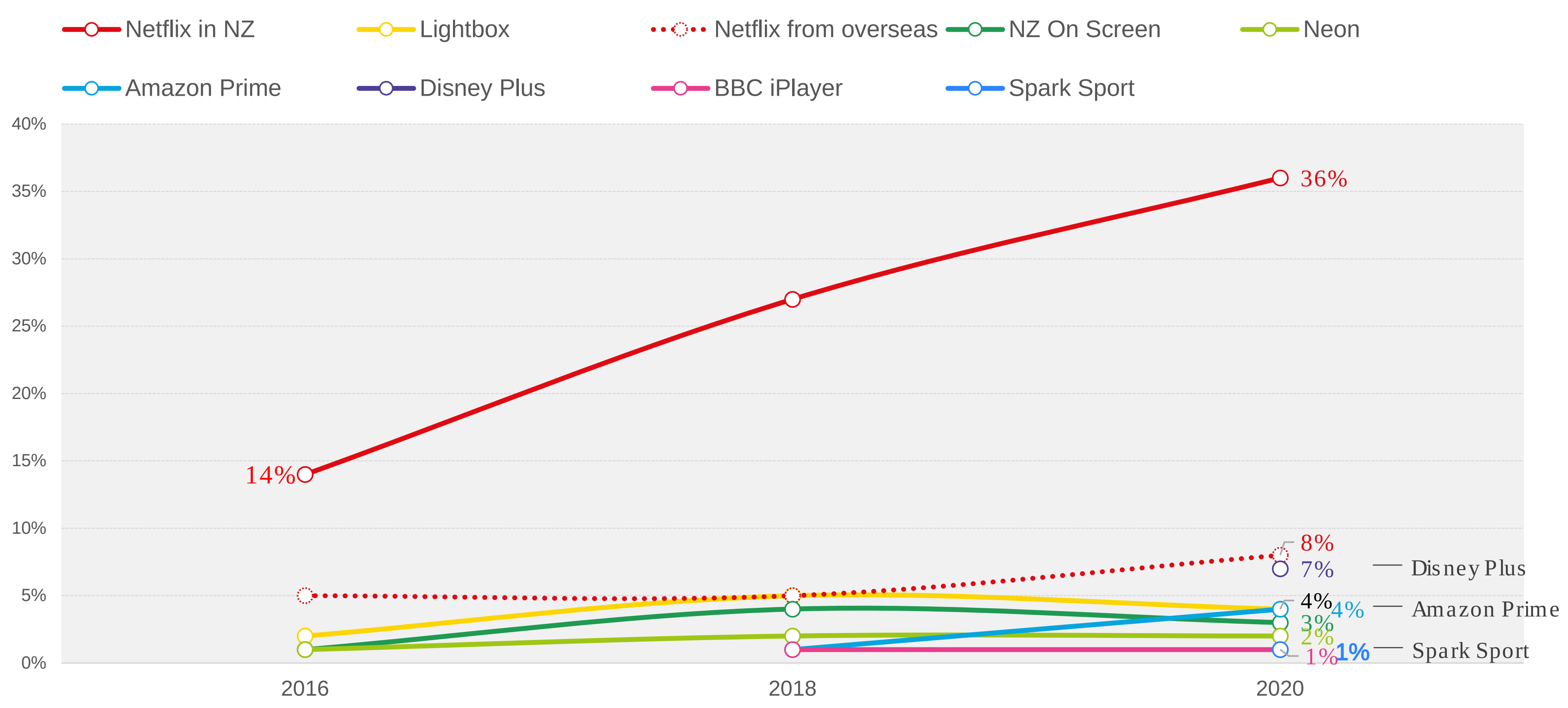
Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511).

Base: Watched Ondemnd: (2014 n=166; 2016 n=248; 2018 n=269; 2020 n=387.

Six in ten New Zealanders (61%) now have access to Netflix, so daily reach has continued to grow since 2018 - more than one in three New Zealanders now watch it each day. Disney Plus (7%) is the only other SVOD provider to reach more than 4% of New Zealanders each day, and with the exception of Amazon Prime, no other providers show growth in audience since 2018.

Daily reach of SVOD sites – all New Zealanders 15+

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



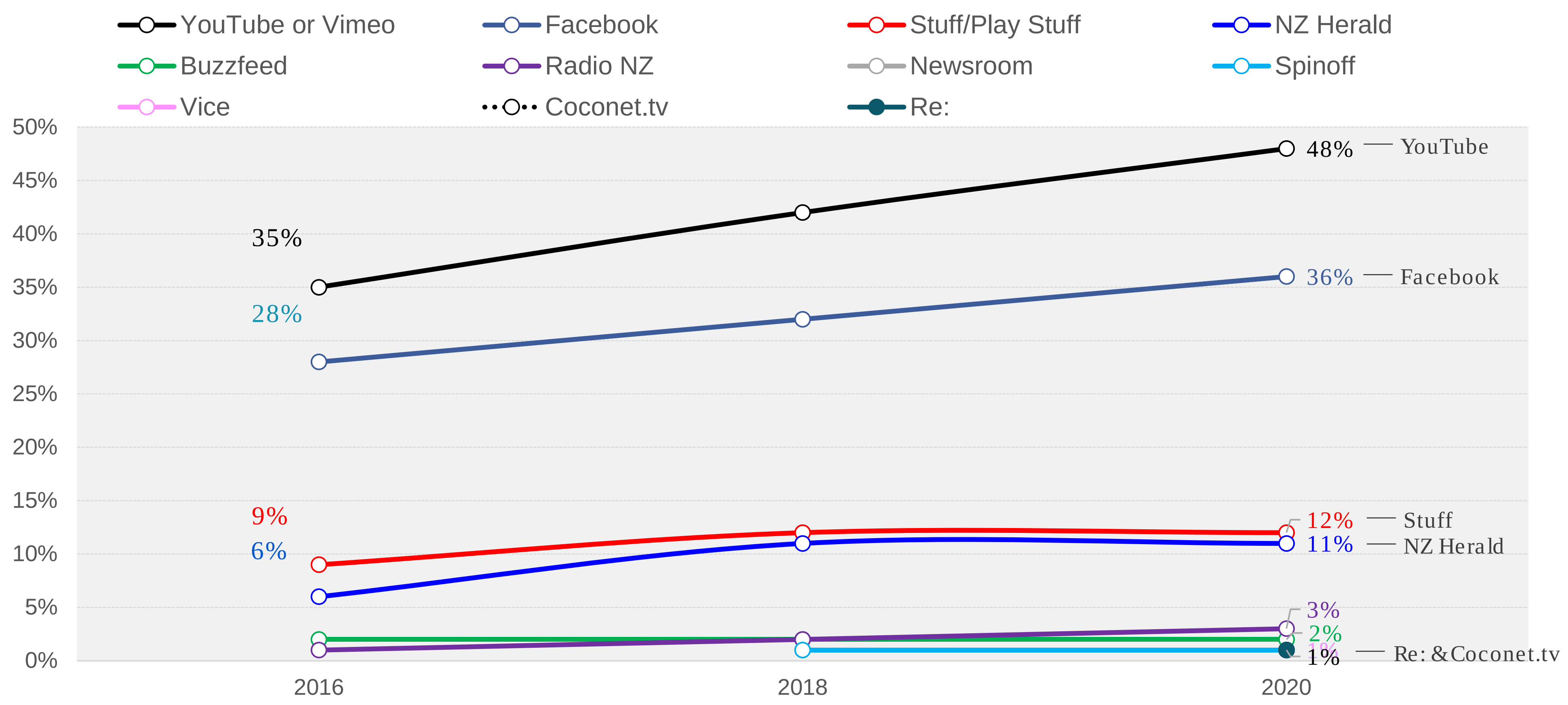
- Given the recent merger of Lightbox and Neon, the combined net daily reach of these two providers is 5%.
- Netflix viewers are more likely to be:
  - aged 15-44 (51% daily reach) – especially 15-24s (57%)
  - double income couples without kids (59%)
  - pre-school families (56%)
  - higher income earners (earn $80,000+ = 42%)

Base: All respondents: (2016 n=1,404; 2018 n=1,414; 2020 n=1,511).

YouTube and Facebook have continued to steadily increase their daily audience since 2018, with no other provider showing similar audience growth. Nearly one in two New Zealanders now watch YouTube (for video) each day and Facebook reaches more than one in three.

Daily reach of online video sites – all New Zealanders 15+

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



YouTube (for video) viewers are more likely to be;

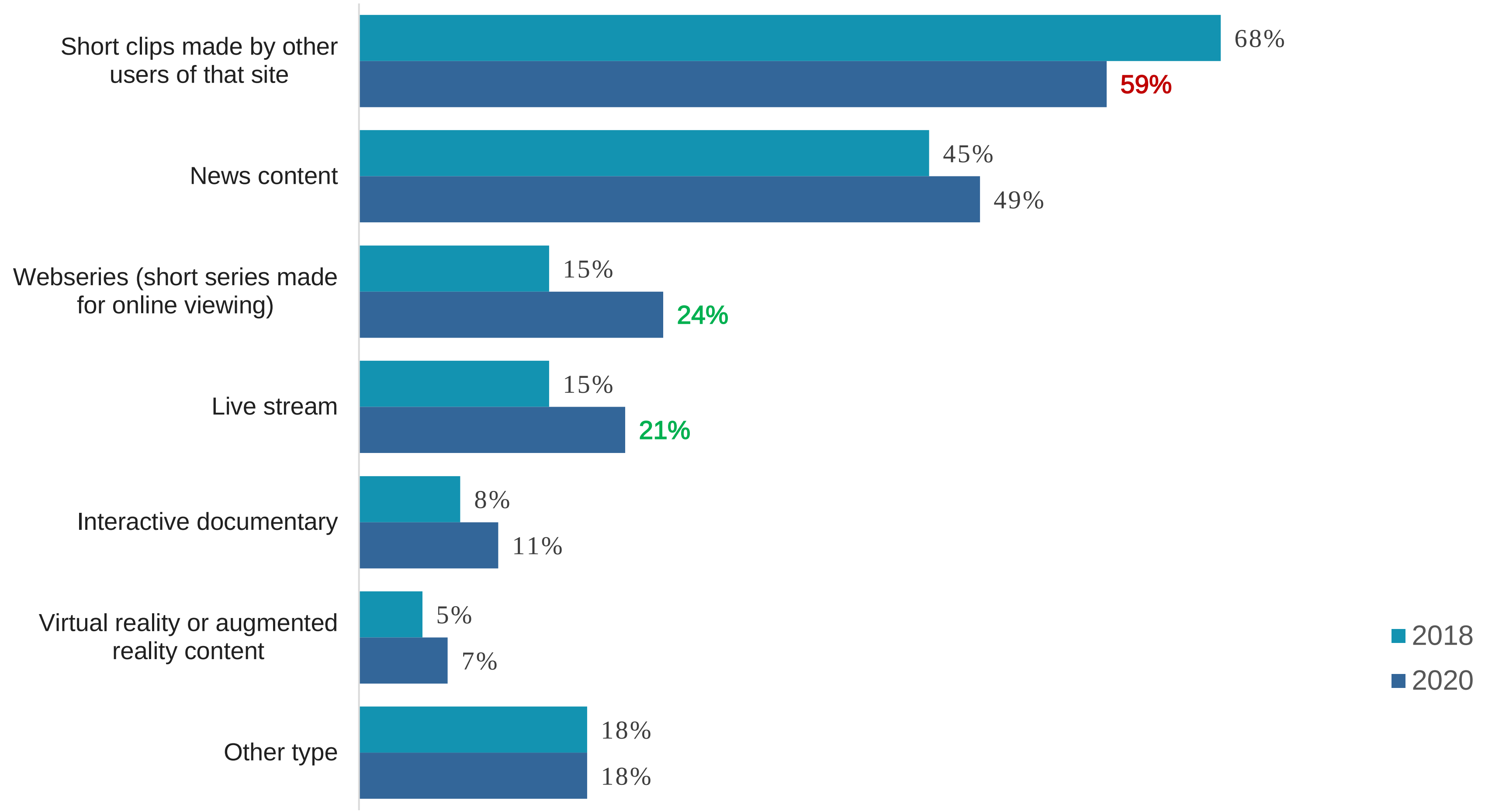
- Males (57%)
- Aged 15-44 (68%) - especially 15-24s (77%)
- Families (60%) - especially pre-school families (67%) and families with kids 15+ (65%)
- Lowest income earners (up to $50,000 = 56%)
- Asian (78%)
- Pasifika (65%)
- Aucklanders (56%)

Base: All respondents: (2016 n=1,404; 2018 n=1,414; 2020 n=1,511).

Despite a decline in audience since 2018, user generated clips remain the most popular type of video to watch online, followed by news content. However the range of videos New Zealanders watch has broadened since 2018 with more New Zealanders now watching webseries and interactive documentaries.

Types of online video watched – all who watched online video yesterday

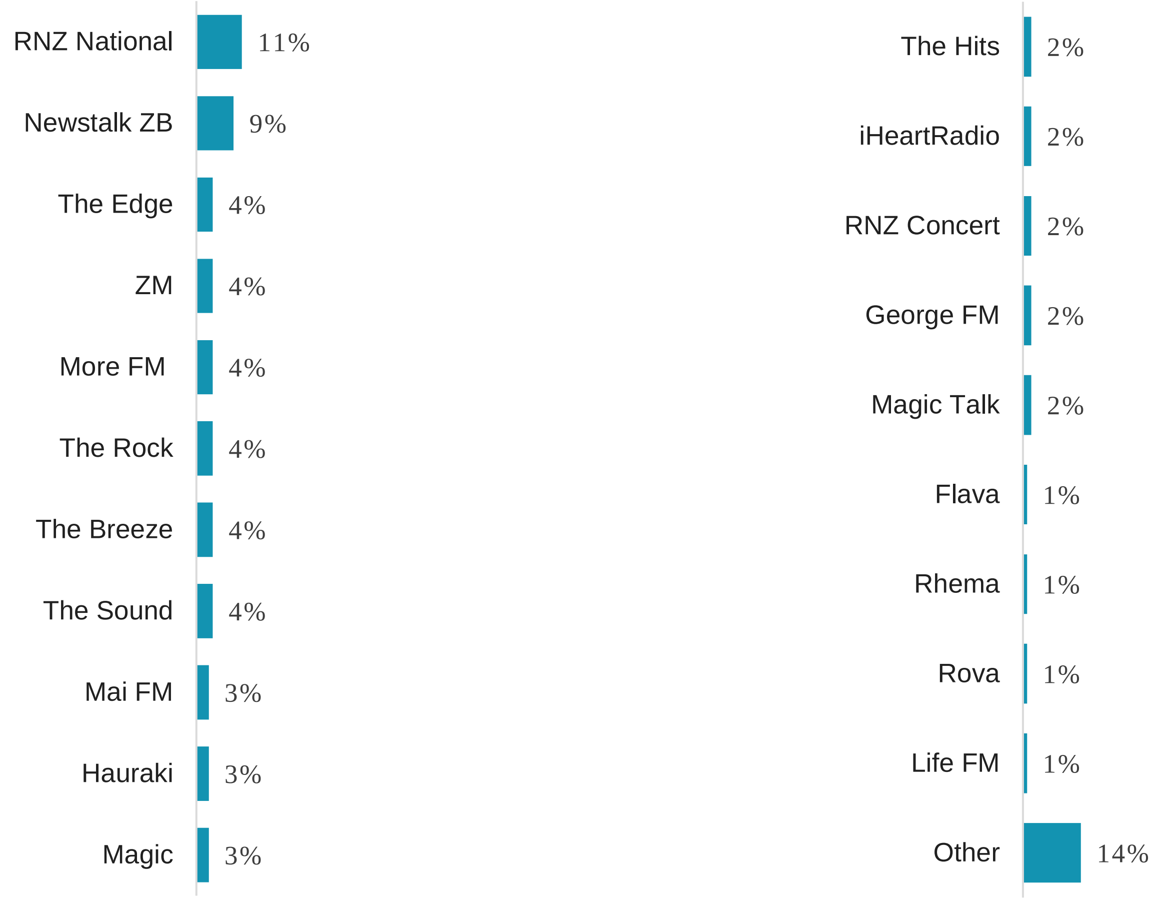
Q: Which of the following types of video did you watch on these sites?



Radio NZ National reaches slightly more than one in ten New Zealanders each day, with Newstalk ZB only slightly below this. No other radio station reaches more than 4% of New Zealanders each day, and there is a long tail of stations that reach less than 1% of New Zealanders.

Daily reach of radio stations 2020 – all New Zealanders 15+

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

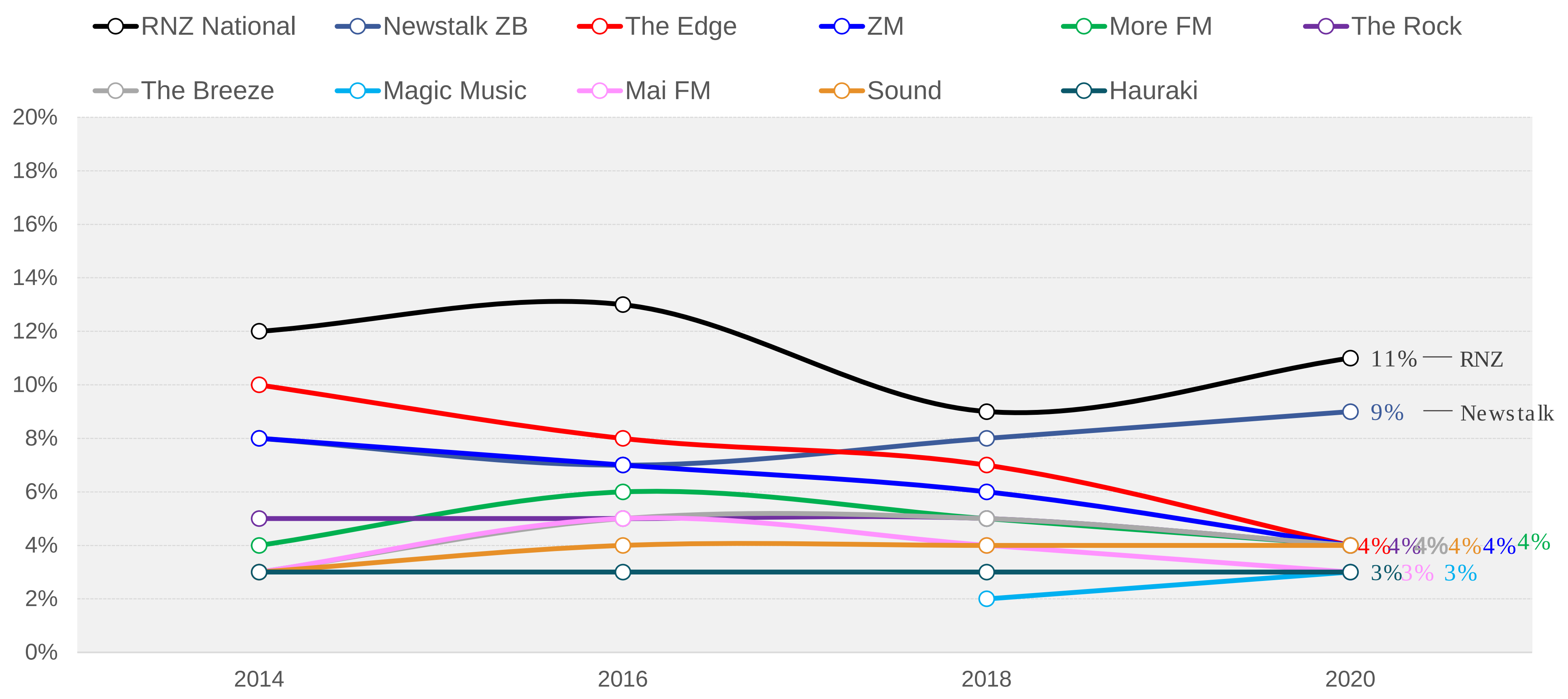


Base: All New Zealanders 15+: (2020 n=1,511).

Both Radio NZ National and Newstalk ZB increased their daily audience size since 2018. These trends could be influenced by Covid 19 coverage during the survey period. All other radio stations either declined in audience size since 2018 or remained stable.

Daily reach of radio stations over time (3% reach and above) – all New Zealanders 15+

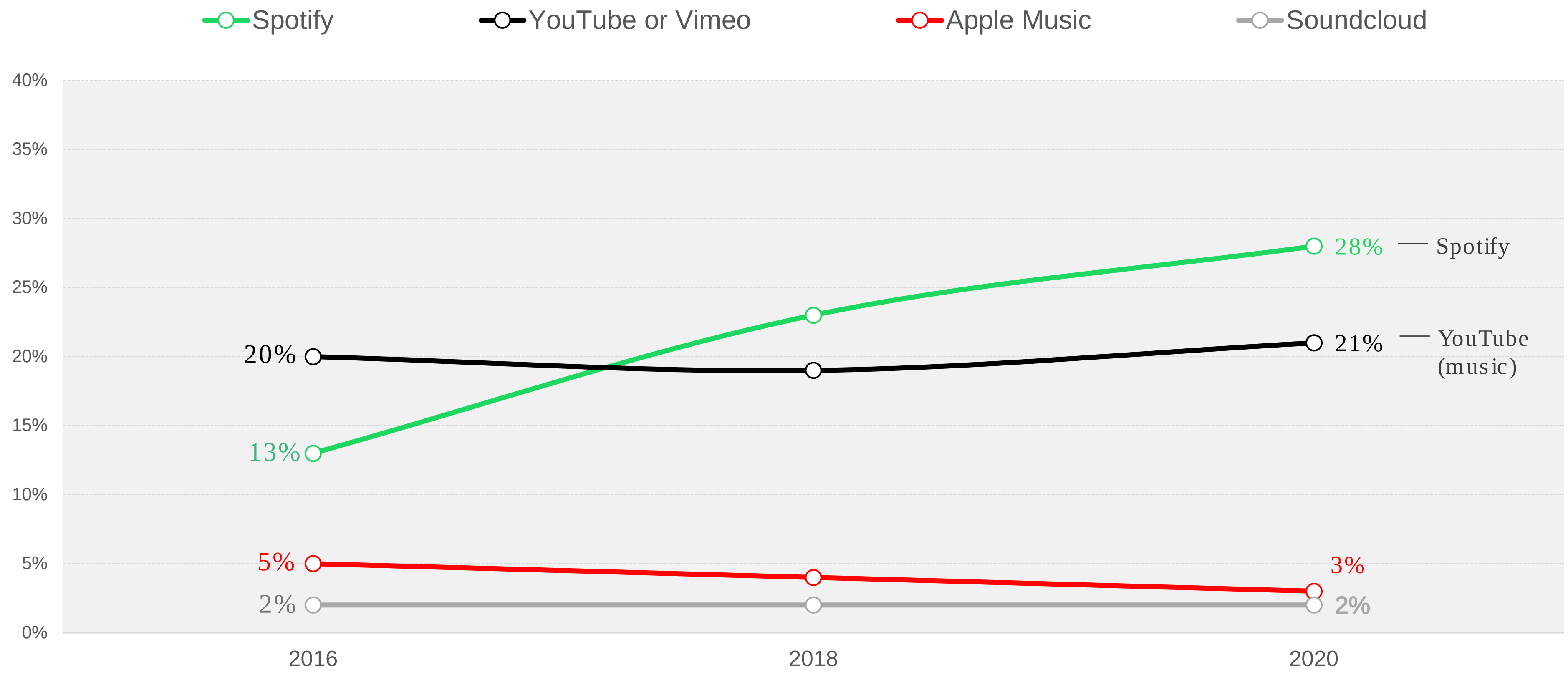
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



Spotify now reaches nearly three in ten New Zealanders each day and has continued to grow in popularity since 2018. YouTube (for music) is second most popular but this audience has not changed in size since 2018.

Daily reach of music streaming sites – all New Zealanders 15+

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



- No other music streaming service reaches more than 3% of New Zealanders each day, and some (eg. Tidal, Amazon Music) did not register any daily reach in this study.

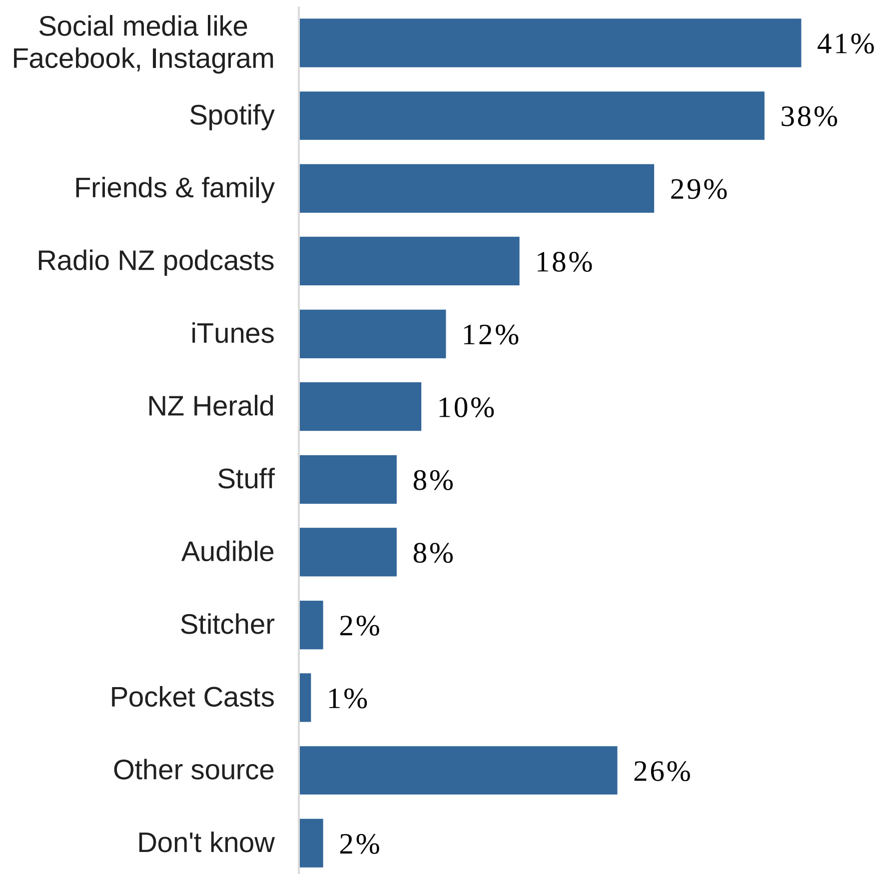
- Spotify listeners are more likely to be:
  - Aged 15-34 (53%) – especially 15-24s (65%)
  - Young singles/couples, no kids (39%)
  - Families with kids aged 15+ (39%)
  - Highest income earners ($150,000+ = 40%)
  - Lowest income earners (up to $20,000 = 34%)
  - Māori (38%)

Base: All respondents: (2016 n=1,404; 2018 n=1,414; 2020 n=1,511).

Word of mouth via social media or friends and family is the most common way New Zealanders find out about new podcasts. Spotify is also widely used by nearly four in ten of those who listen to podcasts. Nearly one in five (18%) use Radio NZ.

Source of new podcasts – all who listened to a podcast yesterday

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



Note: new question in 2020.

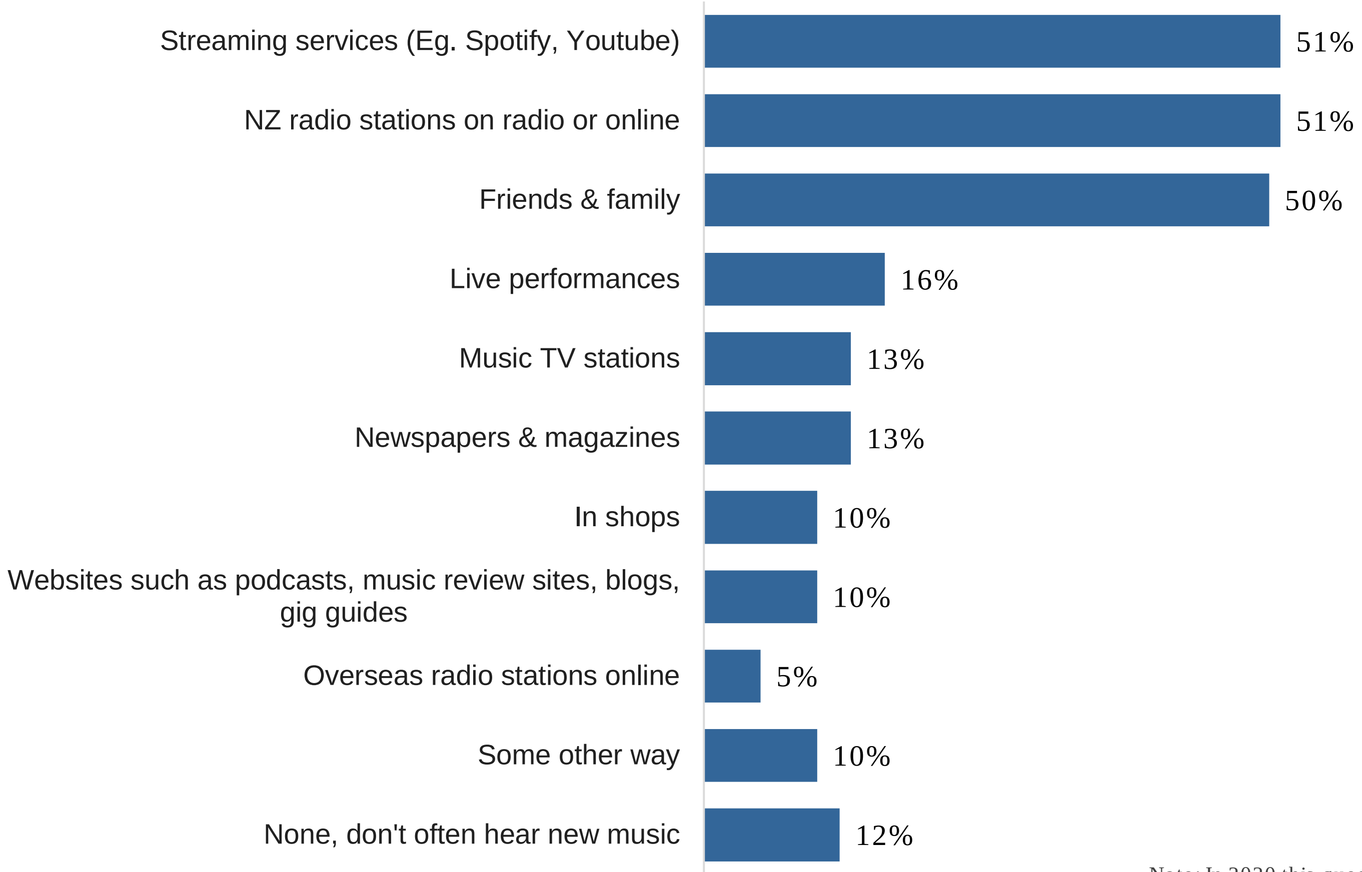
Base: All who listen to podcasts: (2020 n=176).

Music Consumption and Behaviour

There are three main ways that New Zealanders find new music – streaming services, NZ radio stations and word of mouth.

Sources of awareness of new music 2020 – all New Zealanders 15+

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



Note: In 2020 this question was asked of a reduced base size of n=1,053.

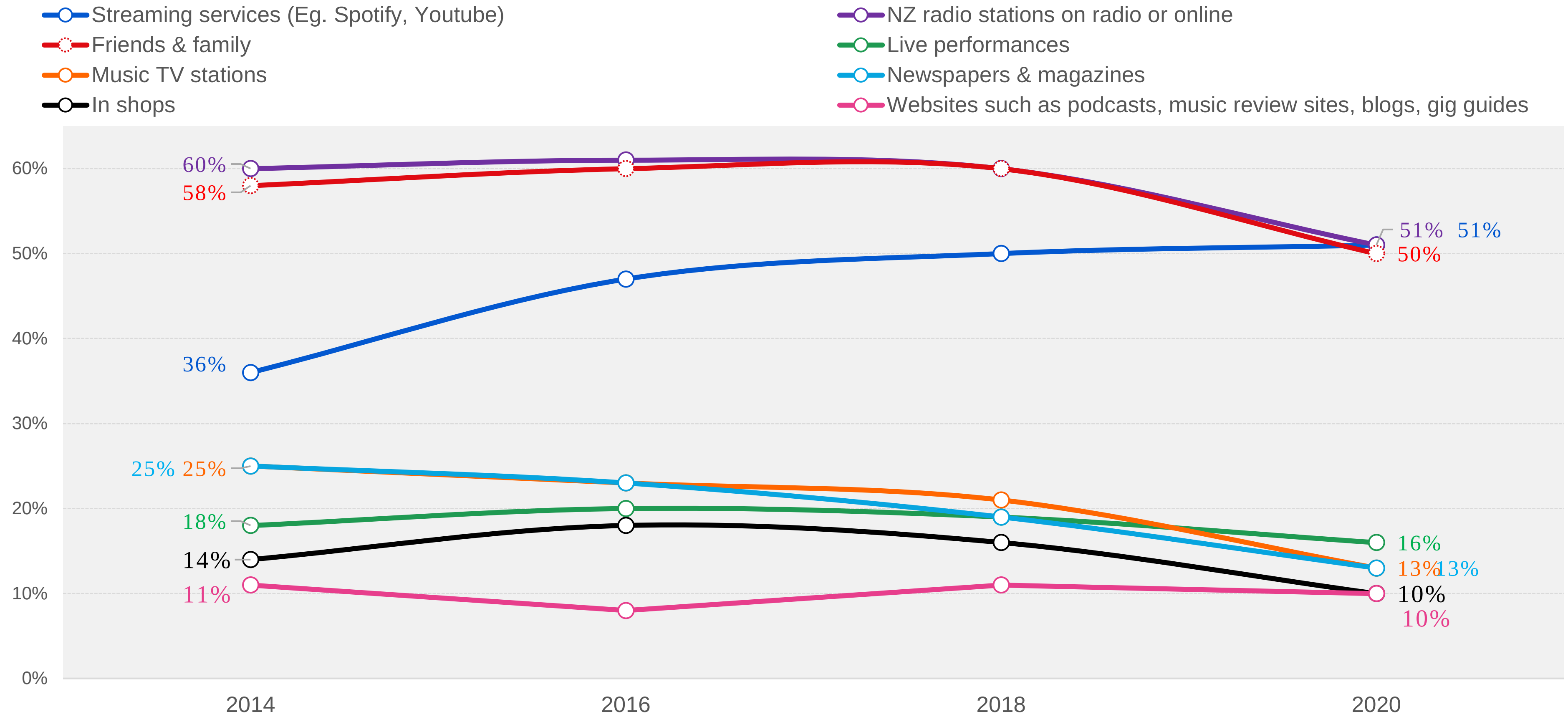
- Streaming services are more widely used as a source of new music by 15-44 year olds (73%), and especially 15-24s (81%).
- While there is a slight skew towards older New Zealanders using NZ radio as a source of new music, this source has relatively broad use across all New Zealanders.
- 15-24 year olds are most likely to find friends and family a useful source of new music (64%).

Base: All New Zealanders 15+ (2020 n=1,053).

While streaming services are now the equal most popular way for New Zealanders to find new music this is due to a decline in use of radio and word of mouth as sources, rather than a significant increase in use of streaming services. All sources have declined since 2018, except streaming services.

Sources of awareness of new music over time – all New Zealanders 15+

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



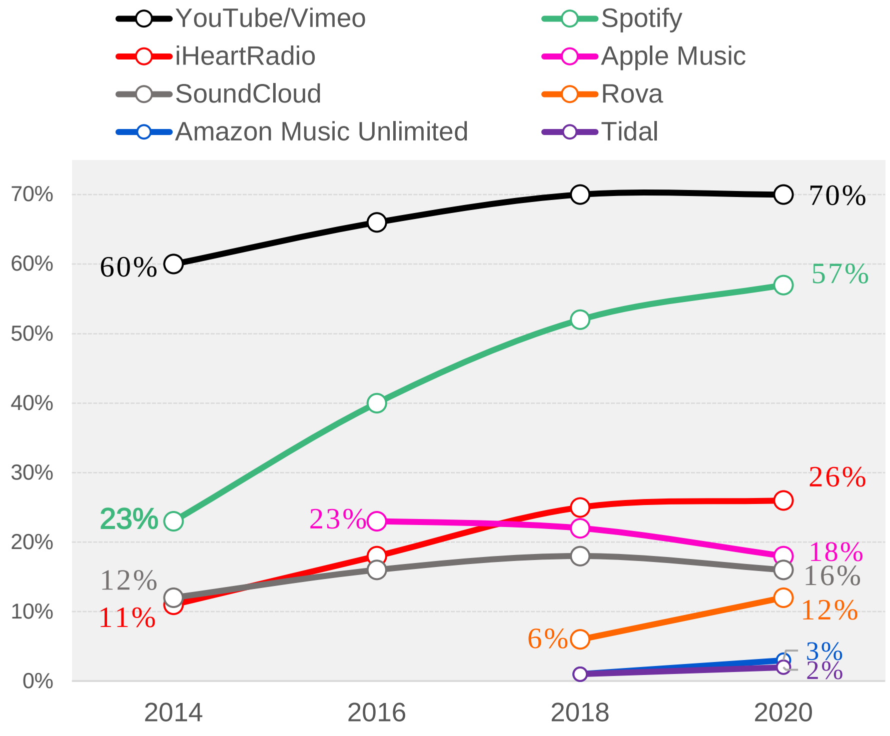
Note: In 2020 this question was asked of a reduced base size of n=1,053.

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,053).

Since 2018 the size of the audience who has ever listened to music online has not grown significantly – except for the growth of Rova to 12%. Instead growth has been driven by those who already listen to streamed music now listening more frequently to Spotify and YouTube. Both weekly reach and the number who listen every day to these sites has increased since 2018.

Ever listen to music online - all New Zealanders 15+

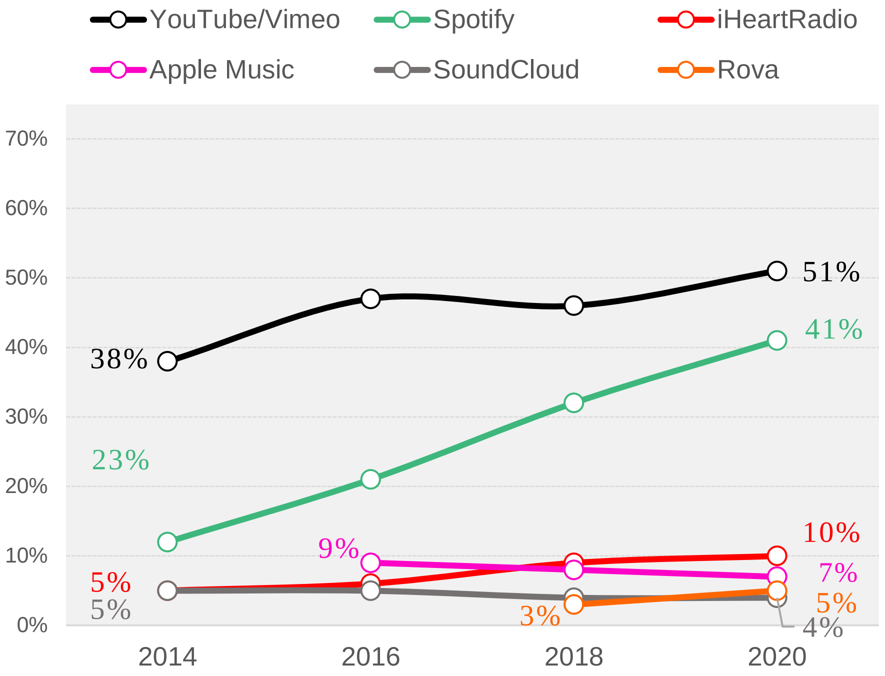
Q: Which of the following have you ever listened to music on?



None of these	2014	2016	2018	2020
	31%	23%	17%	13%

Weekly reach of music streaming sites – all New Zealanders 15+

Q: About how often do you listen to…?



Every day	2016	2018	2020
YouTube	17%	17%	**21%**
Spotify	10%	17%	**22%**

Heavy listeners of streamed music skew towards younger New Zealanders – particularly for Spotify:

- 44% of 15-34 year olds listen to Spotify everyday, and 54% of 15-24s do so.
- 36% of 15-34 year olds listen to music on YouTube everyday, and 38% of 15-24 do so.

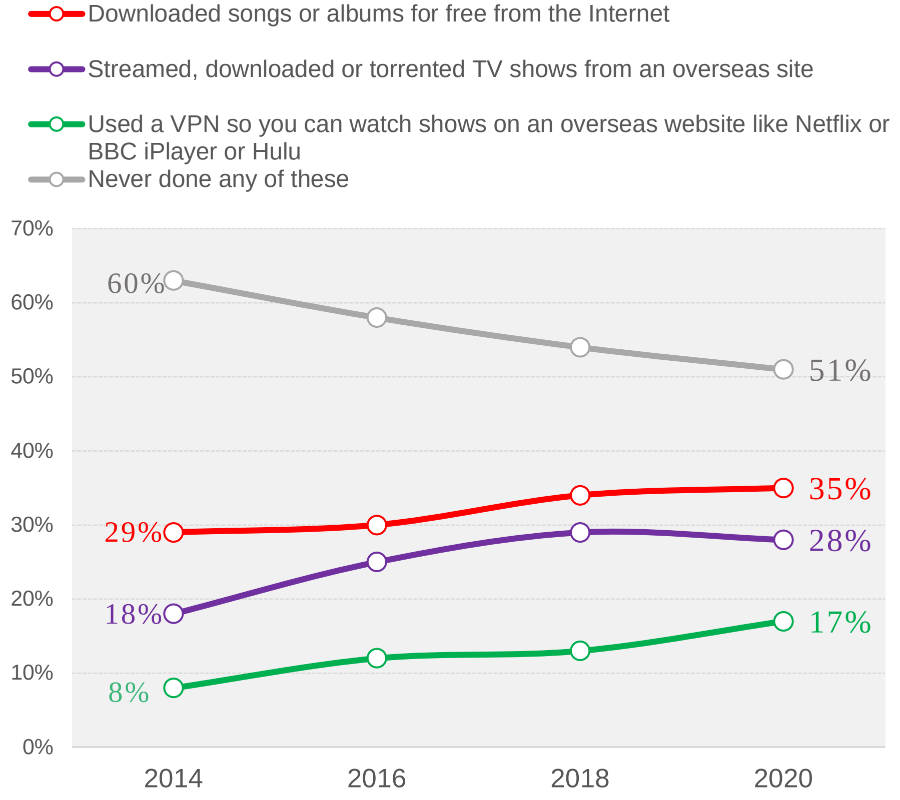
Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511).

Streaming, Downloading and Torrenting

The proportion of New Zealanders who have ever used unauthorised platforms continues to increase but only very slowly. One in two have still never done any of these activities. Frequency of use is only increasing for VPN usage, but only 7% of New Zealanders do this once a week or more.

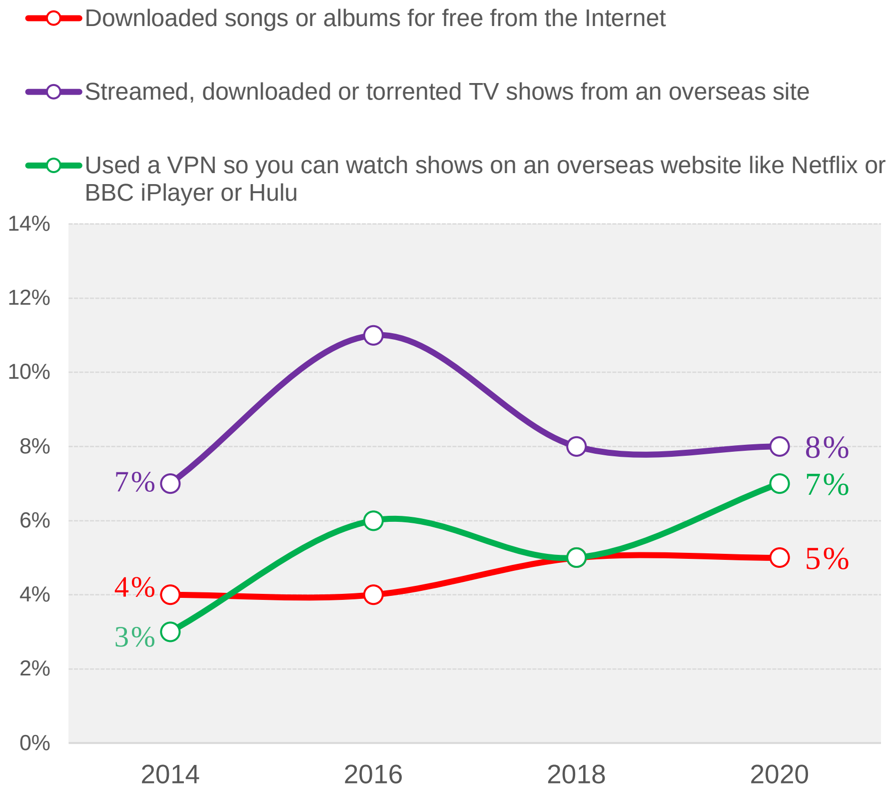
Ever used unauthorised platforms – all New Zealanders 15+

Q: Which of the following have you ever done?



Weekly reach – all New Zealanders 15+

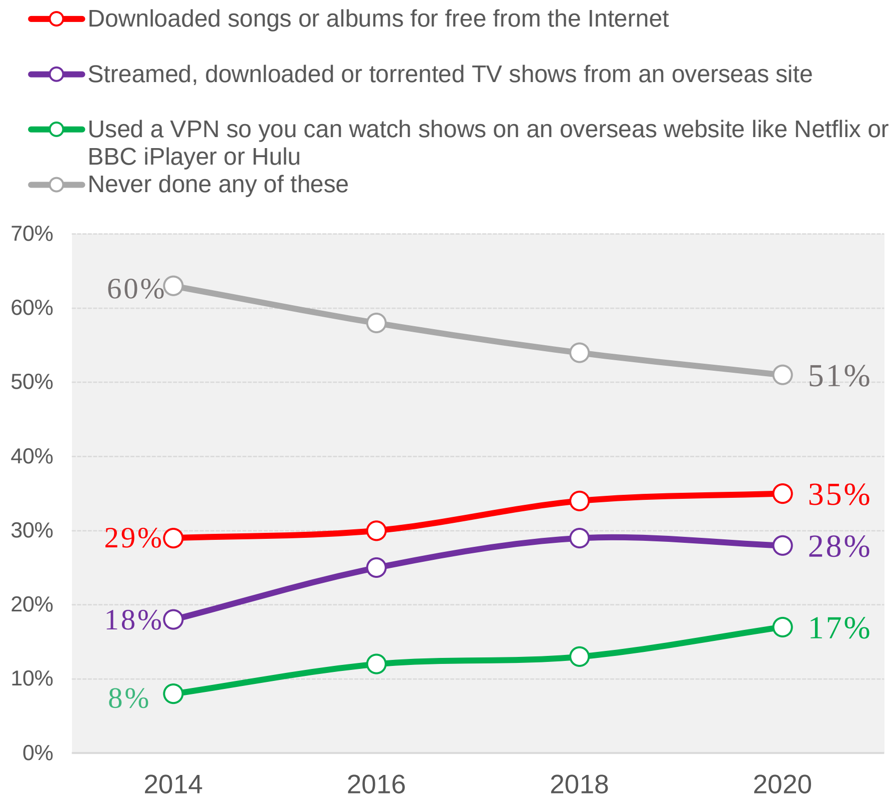
Q: About how often would you…?



Use of unauthorised platforms is slightly higher among younger New Zealanders but is showing little sign of growth overall. No more than one in ten 15 -34 year olds do any of these activities more than once a week.

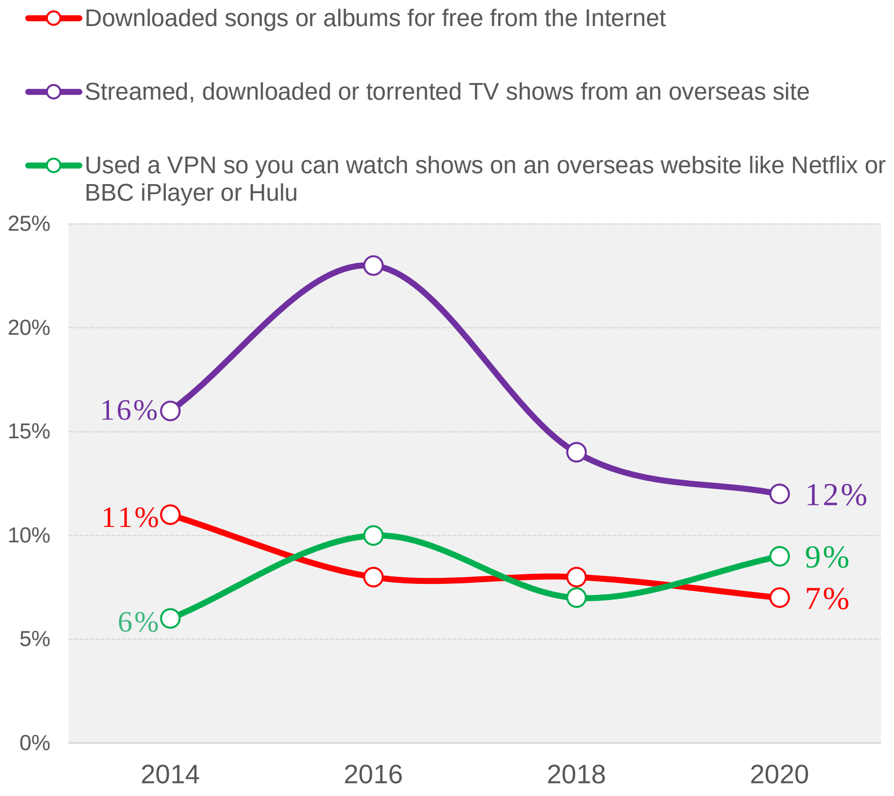
Ever used unauthorised platforms – 15-34 year olds

Q: Which of the following have you ever done?



Weekly reach – 15-34 year olds

Q: About how often would you…?

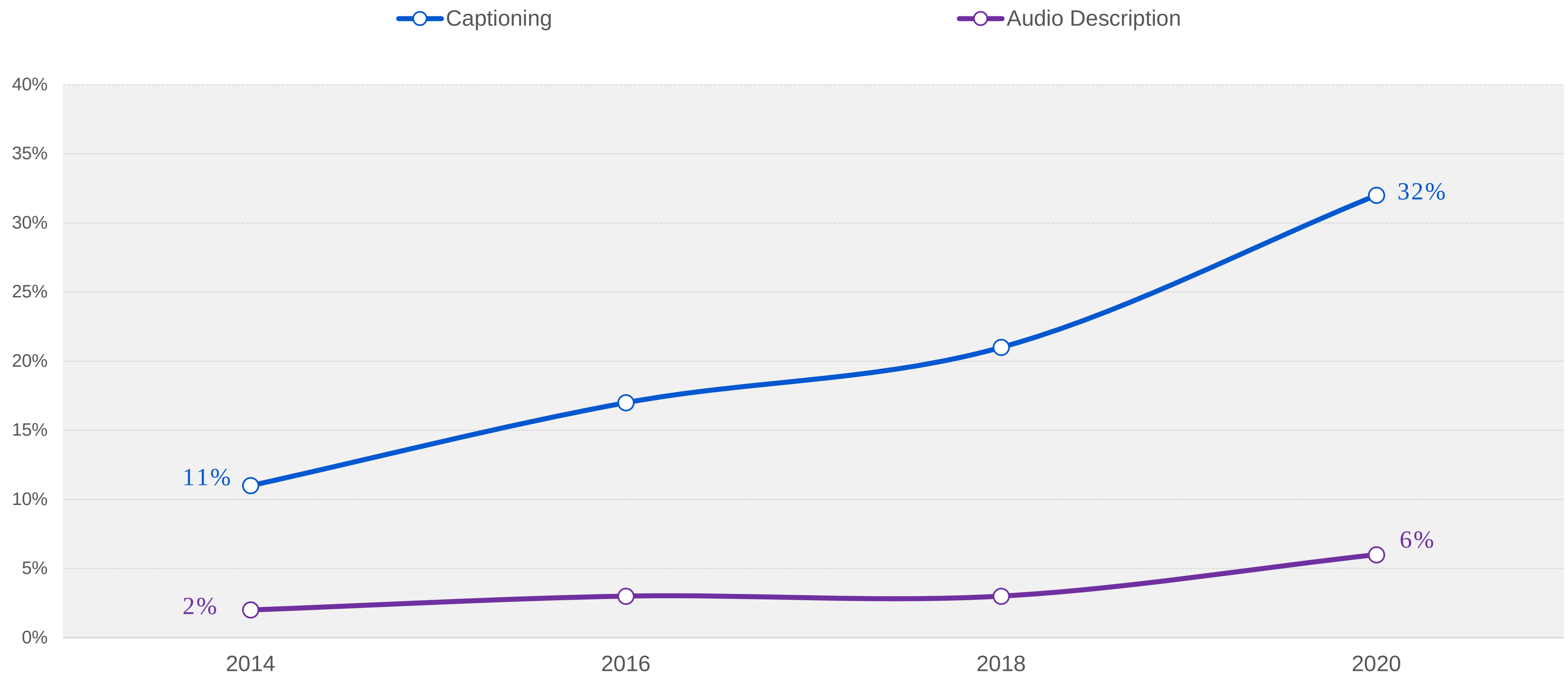


Captioning and Audio Description

One in three New Zealanders have ever used captioning and this has increased significantly since 2018. Use of Audio Description has also increased significantly since 2018 to 6%.

Ever used captioning or audio description – all New Zealanders 15+

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



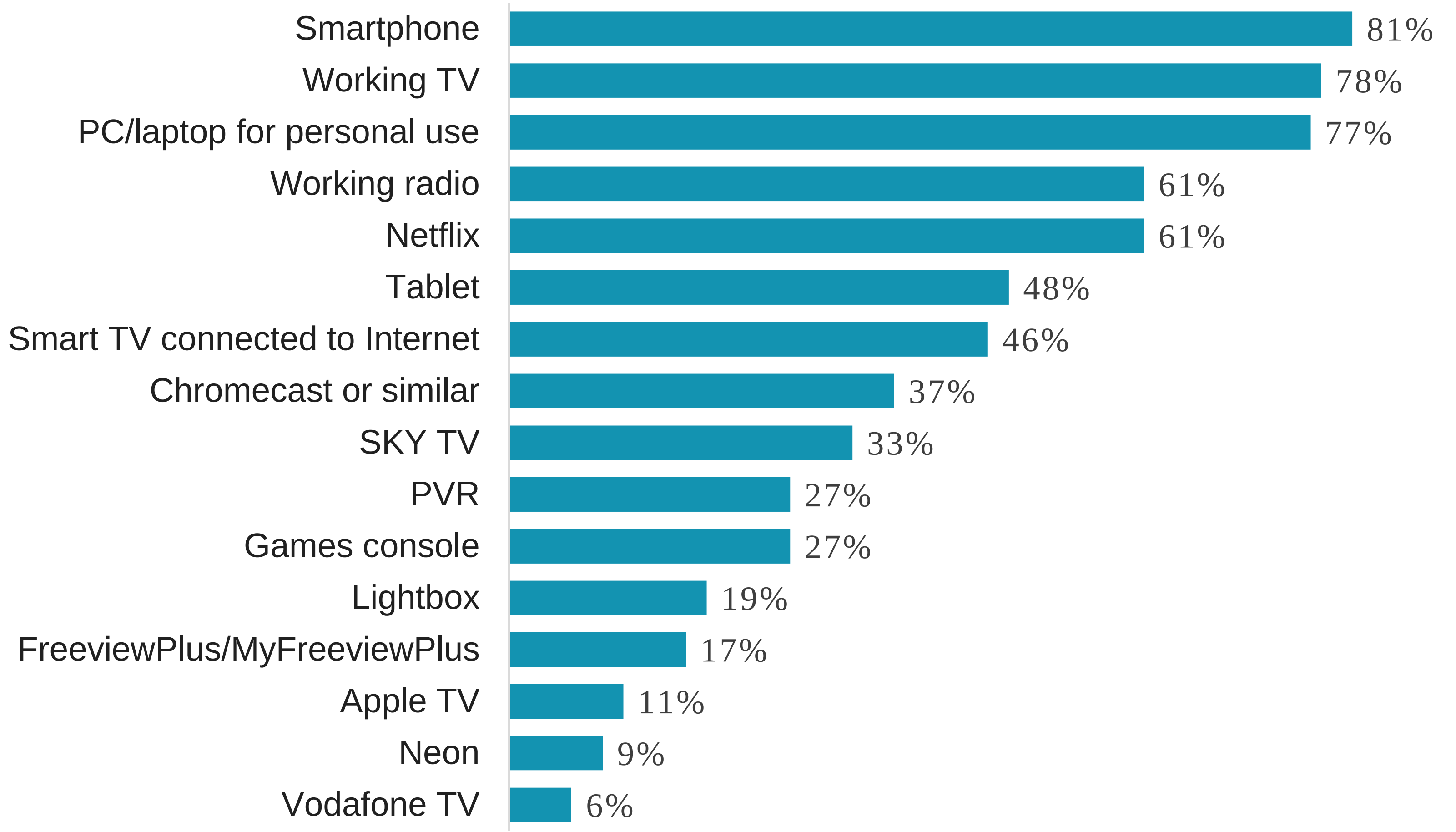
- The group most likely to have ever used the captioning service are New Zealanders of Asian descent (56%).
- Other groups also more likely to have used captioning are:
  - 15-24 year olds (52%)
    - Students (54%)
    - Flatting (47%)
  - Young singles/couples, no kids (43%)
  - 3+ person homes (38%)

Devices Personally Own Or Have Daily Access To

The media New Zealanders consume reflects the devices and platforms available to them. Eight in ten New Zealanders have a smartphone, TV and/or laptop/PC. Access to Netflix is now as widespread as a radio, and nearly one in two have a smart TV that is connected to the Internet. SKY TV is accessible to one in three New Zealanders, and one in four have a gaming console.

Devices & platforms personally own or have daily access to – all New Zealanders 15+

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

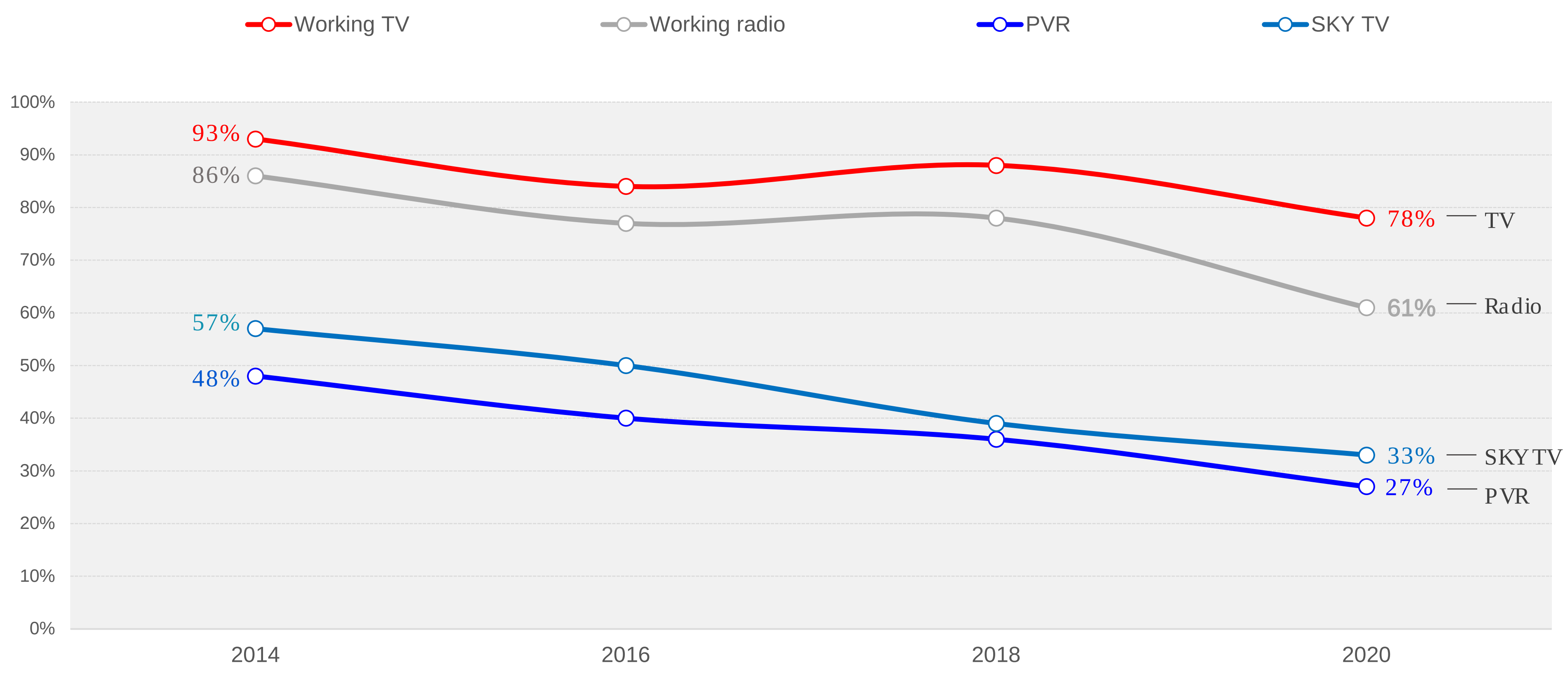


Base: All New Zealanders 15+: (2020 n=1,511).

The incidence of all devices and platforms through which New Zealanders access traditional media has declined since 2018. For SKY TV and PVRs this is a continuation of a trend that has been underway since 2014, but for TVs and radios this is a new trend after stabilising in 2018.

Devices & platforms personally own or have daily access to – all New Zealanders 15+

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



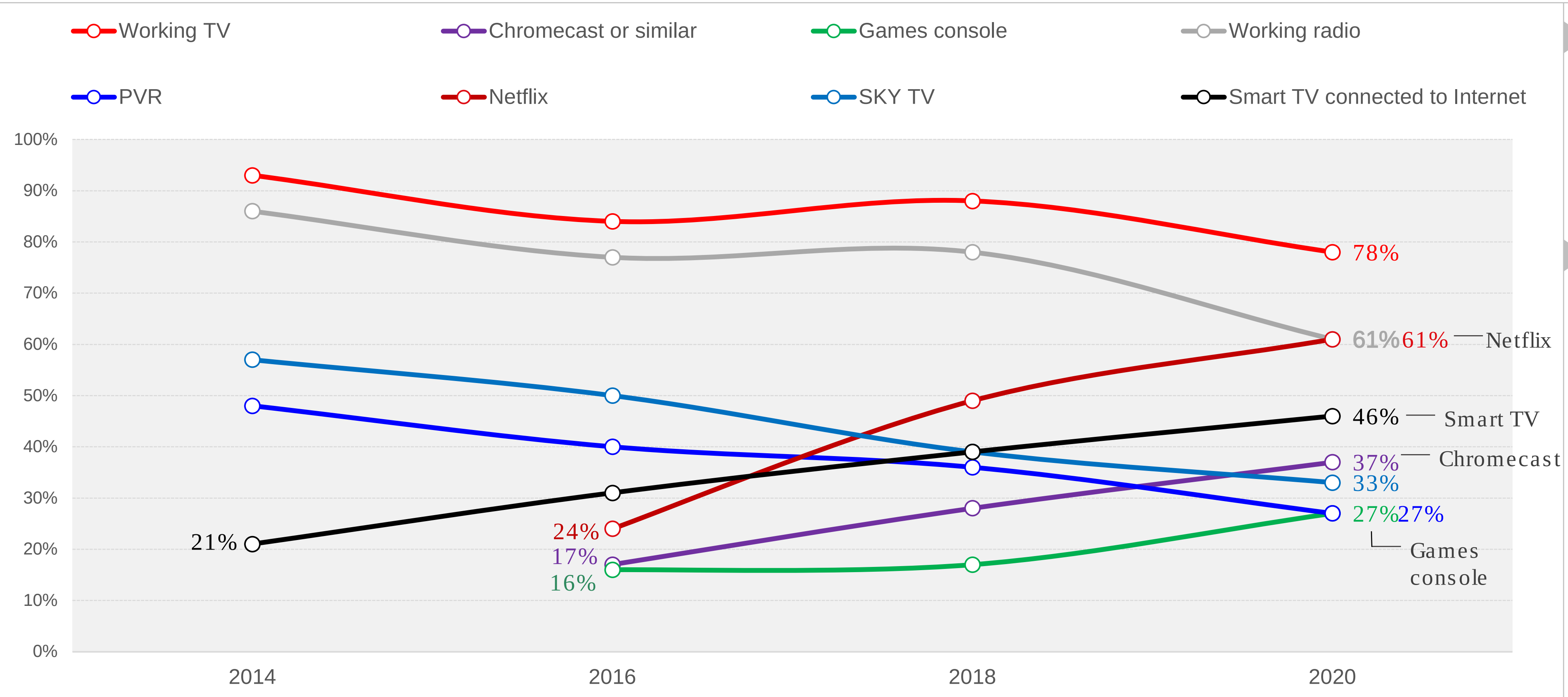
It is possible that the absence of live sport prior to and during the survey period led to more New Zealanders opting out of SKY TV, and who may have re-subscribed when live sport resumed.

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

Conversely Netflix, smart TVs, Chromecast or similar, and gaming consoles continue to increase significantly in incidence. As with media consumption, these device and platform trends potentially mean 2020 is the cross -over point between digital media and traditional media having the ability to deliver the biggest audiences in New Zealand.

Devices & platforms personally own or have daily access to – all New Zealanders 15+

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

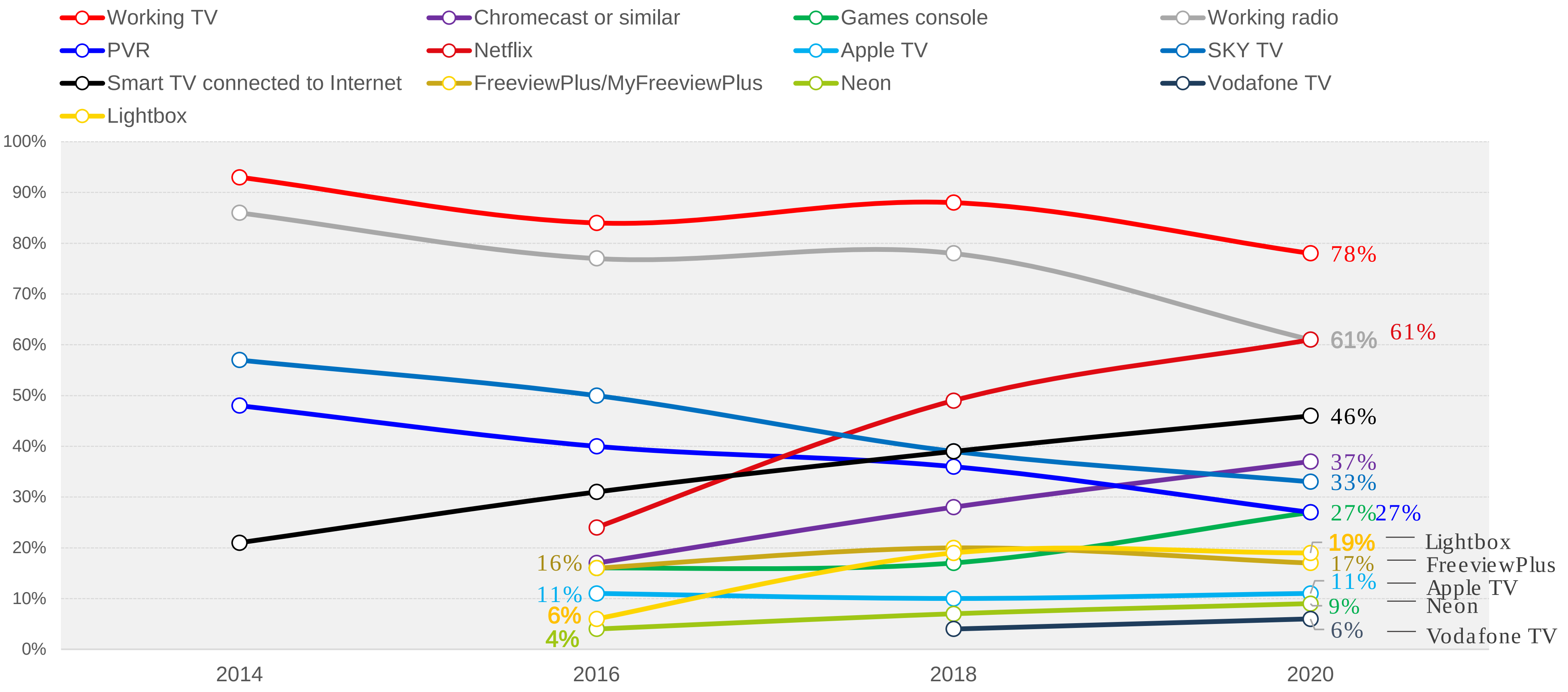


- Netflix, smart TVs connected to the Internet, and Chromecast or similar have all grown at a consistent rate.
- The growth in gaming consoles represents an increase in the rate of growth since 2018.

FreeviewPlus/ MyFreeviewPlus, Lightbox, Vodafone TV, Neon and Apple TV have not increased in incidence since 2018.

Devices & platforms personally own or have daily access to – all New Zealanders 15+

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



As with media consumption, age/ lifestage , socio-economic level, ethnicity and region influence what devices and platforms New Zealanders are more or less likely to have access to.

Age/lifestage

- Younger New Zealanders (under 45s) are significantly more likely to have access to devices and platforms that enable consumption of digital media, and in particular a smart TV connected to the Internet, Chromecast or similar, or a gaming console.
- Conversely older New Zealanders (55+ year olds) are more likely to have access to a working TV or radio, SKY TV or a PVR.

Socio-economic level

- Socio-economic level perhaps plays a more influential role in determining access to devices and platforms than it does media consumption.
- New Zealanders from higher socio-economic groups are more likely to have access to many devices and platforms including a TV, SKY TV, PVR, smart TV connected to the Internet, Chromecast or similar, or a gaming console.

* For the purposes of this analysis, socio-economic level is a term used to summarise the trends evident in media behaviour among different income and occupation groups.

As with media consumption, age/ lifestage , socio-economic level, ethnicity and region influence what devices and platforms New Zealanders are more or less likely to have access to.

Ethnicity

- Asian New Zealanders are less likely to have access to a working TV, radio, SKY TV or PVR which limits their ability to consume traditional media.
- Māori on the other hand are more likely to have access to a working TV, SKY TV, PVR or gaming console.

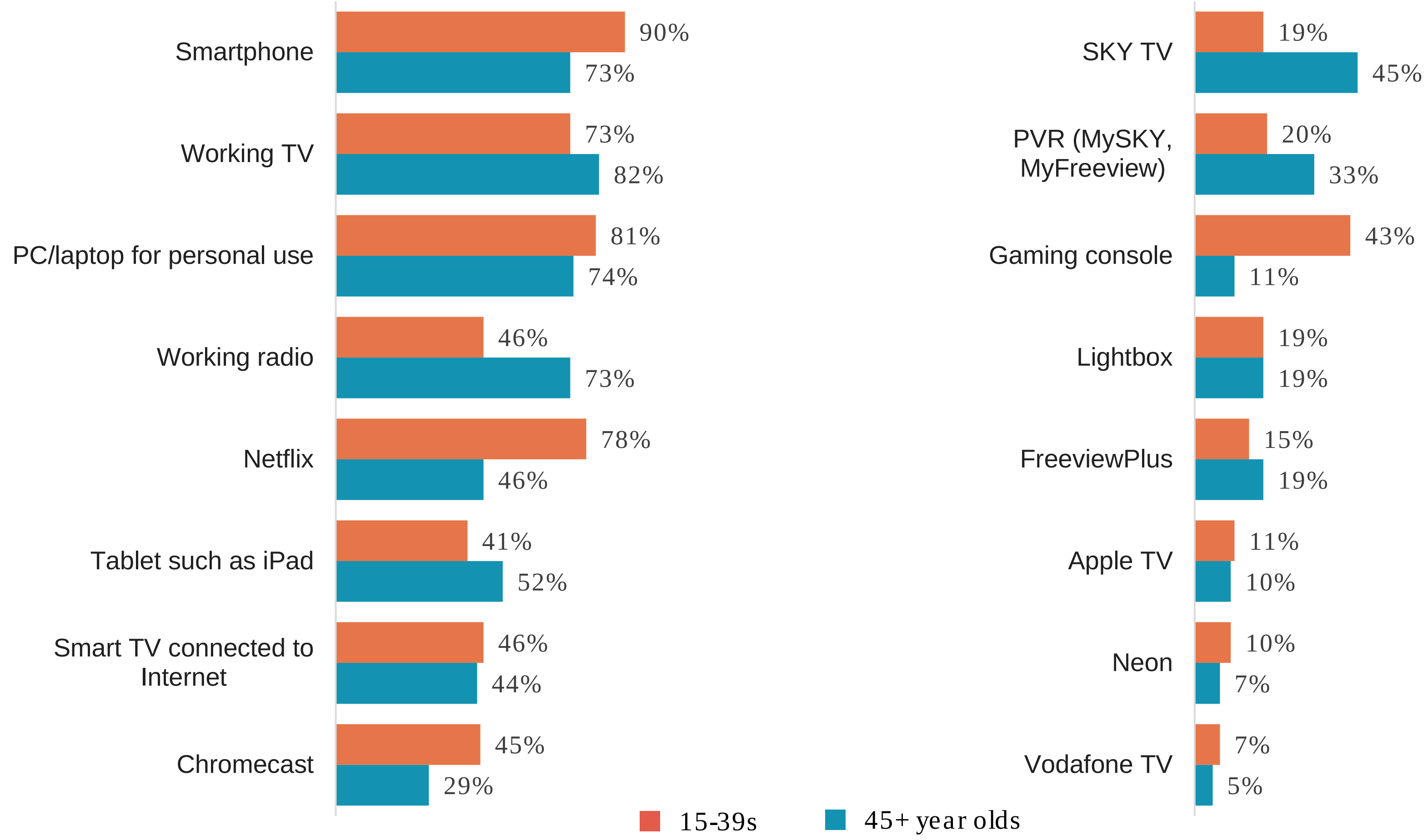
Region

- Aucklanders are less likely to have access to a working TV, radio, or SKY TV.

Younger New Zealanders are more likely to have access to smartphones, Netflix, Chromecast, and gaming consoles enabling this group to use digital media in greater numbers. Older New Zealanders are more likely to have access to a TV, radio, tablet, SKY TV or PVR enabling more of this group to use traditional media.

Devices & platforms personally own or have daily access to – 15-39s vs. 45+ year olds

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



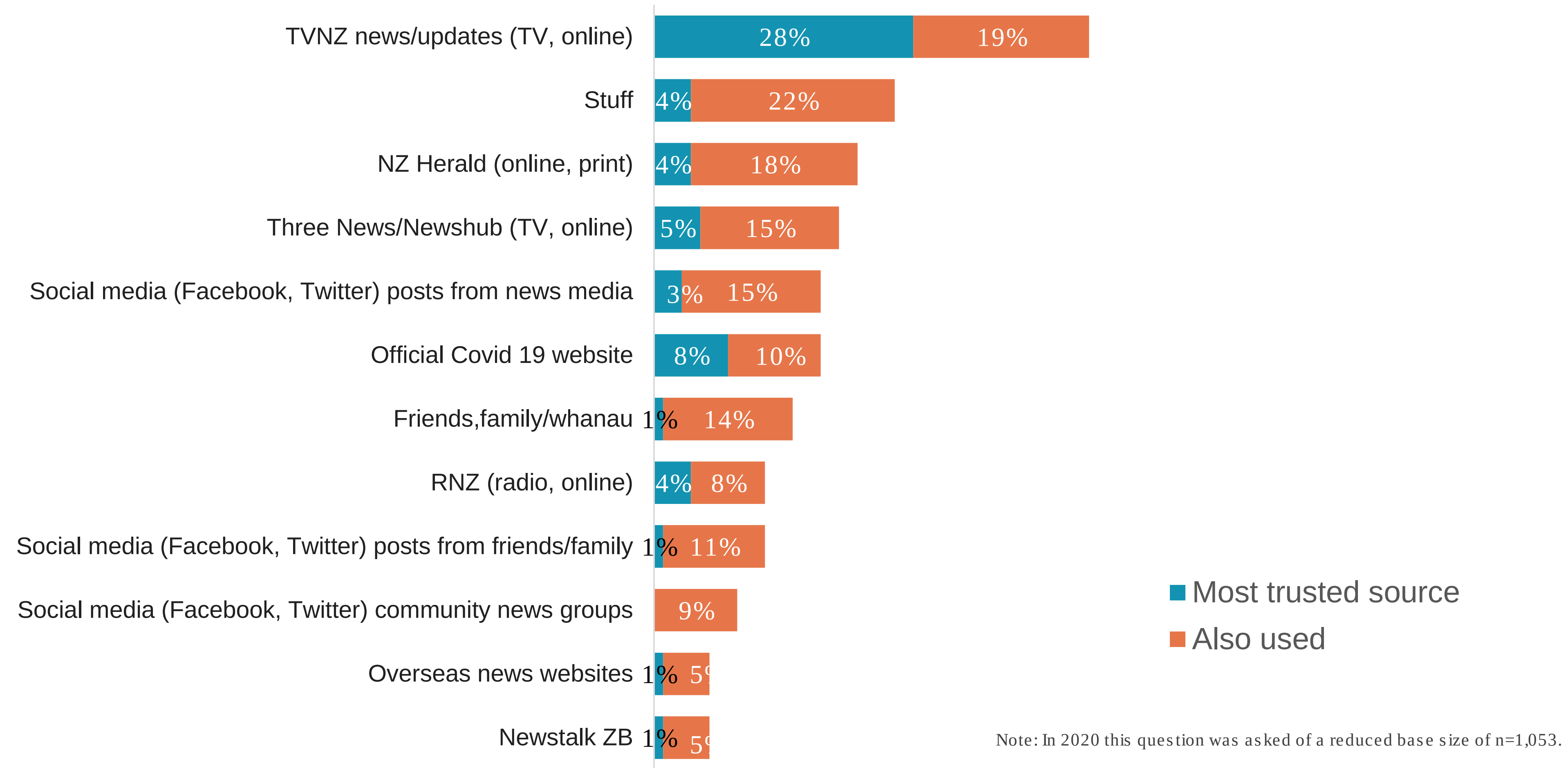
Base: All 15-39s (n=630), all 45+ year olds (n=756)

Sources of news during Covid-19 lockdown

The daily TVNZ 1 Covid-19 updates were New Zealanders' most widely used (47%) and most trusted source of news (28%) by a significant margin. This will have contributed to TVNZ 1's stable daily reach in 2020. The official Covid -19 website was the second most trusted source. Social media was widely used, but it was the most trusted source of very few New Zealanders.

Sources of news and information during COVID 19 lockdown (top 12 sources)

Q: Which of the following sources of news and information did you use to keep updated about the COVID 19 outbreak?
And of these, which was your most trusted **source** of news that you used to keep updated about the COVID 19 outbreak?



Note: In 2020 this question was asked of a reduced base size of n=1,053.

- Not surprisingly there are similarities between those more likely to watch TVNZ 1 and those who trusted this source of information:
  - Females (33% trust)
  - 65+ year olds (38%)
  - Māori (35%)
- The profile of those who trusted the Covid 19 website is very broad with no significant trends.
- 15-24 year olds are more likely to trust word of mouth from either friends/family or social media posts from friends/family (9% cf. 2% overall).

Base: All New Zealanders 15+: (2020 n=1,053).

Appendix
~ 2020 ~

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Linear TV 61% daily reach overall	• 15-34 year olds (37%) – students (37%) – flatting (27%) • Double income couples, no kids (44%) • Pre-school families (52%) • 5+ person homes (48%) • Blue collar workers (52%) • Asian (28%) • Aucklanders (51%) • Games console in home (53%)	• 50+ year olds (83%) – retirees (86%) – empty nesters (81%) • 1-2 person homes (72%) • Sky TV homes (85%) • PVR homes (85%) • FreeviewPlus homes (77%) • Vodafone TV (73%)
On demand 26% daily reach overall	• Students (21%) • Unemployed (22%) • Lowest income earners (up to $20,000 – 16%) • Single person homes (18%) • Older, living alone (17%) • Asian (17%)	• Females (29%) • 45-54s (34%) • Pre-school families (34%) • Solo parents (37%) • 5+ person homes (32%) • Upper white collar workers (32%) • Higher income earners (over $80,000 – 31%) • Māori (32%) • SVOD home (30%) • FreeviewPlus home (35%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Total SVOD 48% daily reach overall	• 60+ year olds (19%) – empty nesters (30%) – older, living alone (23%) – retiree (20%) – single person homes (29%) • Lower income earners ($20-$50,000 – 36%) • SKY TV homes (37%) • PVR homes (39%)	• 15-44 year olds (65%) – students (68%) – flatting (61%) • Double income couples, no kids (67%) • Families (57%) – Esp. pre-school families (70%) – 3+ person homes (60%) • Home-makers (55%) • High income earners ($150k+ - 62%) • Upper white collar workers (55%) • Asian (63%) • Aucklanders (52%) • Chromecast (62%) • Smart TV connected to internet (58%)
Online Video 60% daily reach overall	• Females (54%) • 45+ year olds (37%) – 60+ year olds (25%) – retirees (20%) – empty nesters (34%) – 1-2 person homes (45% • Lower income earners ($20-$50,000 – 48%) • Pakeha (52%) • SKY TV homes (49%)	• Males (66%) • 15-44 year olds (83%) – 15-24s (91%) – students (97%) – flatting (77%) • Young singles or couples, no kids (76%) • Families (72%) – Pre-school families (79%) – 3+ people homes (74%) • Blue collar workers (72%) • Asian (86%) • Pasifika (77%) • Aucklanders (68%) • Chromecast (71%) • SVOD homes (68%) • Games console in home (80%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Radio 50% daily reach overall	• 15-44 year olds (40%) – 15-24s (36%) – students (33%) – flatting (39%) • Young singles or couples, no kids (38%) • Home-makers (42%) • 4+ person homes (43%) • Unemployed (28%) • Lowest income earners (up to $20k – 30%) • Highest income earners ($150,000 + - 44%) • Asian (46%) • Māori (43%) • Pasifika (39%)	• 65+ year olds (69%) – empty nesters and older singles (62%) – retirees (68%) – single person homes (58%) • SKY TV homes (57%) • PVR homes (58%)
Online NZ Radio 13% daily reach overall	• Unemployed (5%) • Lowest income earners (up to $20,000 – 4%)	• 45-59 year olds (20%) • Upper white collar workers 17%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Music Streaming 44% daily reach overall	• Females (41%) • 50+ year olds (19%) – 65+ year olds (12%) – retirees (11%) – empty nesters and older singles (17%) – 1-2 person homes (29%) • Home-makers (32%) • Lower income earners ($20-$50,000 – 35%) • Pakeha (36%) • SKY TV homes (36%)	• Males (48%) • 15-39 year olds (72%) – 15-24s (88%) & 25-29s (67%) – students (89%) – flatting (70%) • 4+ people homes (63%) • Young singles and couples, no kids (58%) • Families (56%) • Lowest income earners (up to $20,000 – 57%) • Unemployed (52%) • Highest income earners ($150,000+ - 54%) • Asian (66%) • Pasifika (63%) • Māori (54%) • Chromecast (55%) • Smart TV connected to internet (50%) • SVOD homes (55%) • Games console in home (66%)
Music on CDs/iPod/vinyl 16% daily reach overall	• No consistent significant trends. Equal appeal across all groups.	• No consistent significant trends. Equal appeal across all groups.

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Podcasts 12% daily reach overall	• 60+ year olds (5%) • Retirees (4%) • Empty nesters (7%)	• Males (15%) • 15-29s (20%) – students (23%) • Pre-school families (23%) • Families with kids 15+ (20%) • 4+ person homes (17%) • Upper white collar workers (16%)

Online gaming
36% daily reach overall
	• Females (33%)
	• 45+ year olds (26%)
	  – retirees (28%)
	  – empty nesters (27%)
	  – single person homes (25%)
	• Upper white collar workers (29%)
	• High income earners ($120,000+ - 29%)
		• Males (39%)
		• 15-44 year olds (46%)
		  – 15-24s (53%)
		  – students (56%)
		  – 5+ person homes (47%)
		• Unemployed (43%)
		• Asian (48%)
		• Pasifika (51%)
		• Māori (43%

Daily profile of audiences on key content providers

TVNZ 1 (44% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• Male (39%) • 15-39s (22%) – students (20%) – flatting (21%) • Young singles/couples, no kids (28%) • Pre-school families (21%) • 3+ person homes (32%) • Blue collar workers (35%) • Asian (20%) • Pasifika (30%) • Aucklanders (35%) • SVOD homes (39%) • Games console in home (33%)	• Females (49%) • 55+ (72%) – retirees (73%) – empty nesters and older singles (66%) – 1-2 person homes (56%) • SKY TV homes (60%) • PVR homes (62%)

TVNZ 2 (14% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• Young singles, living alone (6%) • Flatting (6%)	• 40-54 year olds (21%) • Families with school aged kids (24%) • Solo parents (29%) • Unemployed (23%) • Lower white collar workers (18%) • Māori (20%)

THREE (23% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 15-34s (10%) – students (8%) – flatting (8%) • Young singles/couples, no kids (11%) • 3+ person homes (18%) • Asian (13%)	• 45+ year olds (32%) – retirees (31%) – empty nesters (33%) – 1-2 person homes (28%) • SKY TV homes (31%) • MyFreeview homes (32%)

PRIME (9% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 15-39s (3%) – students (0%) – flatting (2%) • Young singles/couples, no kids (2%) • 3+ person homes (6%) • Families with pre-school kids (2%) • Asian (3%) • SVOD homes (6%) • Games console in home (5%)	• 45+ year olds (15%) – 65+ year olds (20%) – retirees (20%) – empty nesters and older singles (17%) – 1-2 person homes (13%) • South Islanders (12%) • Māori (13%)

Daily profile of audiences on key content providers

NETFLIX (36% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 60+ year olds (12%) – retirees (11%) – empty nesters (18%) – single person homes (17%) • Lower income earners ($20-$50,000 – 26%) • SKY TV homes (27%)	• 15-44 year olds (51%) – 15-24s (57%) – students (54%) – flatting (46%) • Double income couples, no kids (59%) • Families with pre-school kids (56%) • 3+ person homes (45%) • Higher income earners ($80,000+ - 42%) • Smart TV connected to Internet (48%) • Chromecast homes (49%) • Game console in home (51%)

YouTube - for video (48% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• Females (39%) • 45+ year olds (27%) – 60+ year olds (18%) – retirees (12%) – empty nesters (25%) – 1-2 person homes (34%) • Lower white collar workers (39%) • Pakeha (38%) • SKY TV homes (36%) • PVR homes (41%)	• Males (57%) • 15-44 year olds (68%) – 15-24s (77%) – students (88%) – flatting (59%) – Young singles, living alone (70%) • Families (60%) – Pre-school families (67%) – Families with kids 15+ (65%) • 4+ person homes (64%) • Unemployed (57%) • Blue collar workers (58%) • Lowest income earners (up to $50,000 – 56%) • Asian (78%) • Pasifika (65%) • Aucklanders (56%) • Chromecast homes (58%) • SVOD homes (54%)

Daily profile of audiences on key content providers

SPOTIFY (28% overall)	
LESS LIKELY TO WATCH	**MORE LIKELY TO WATCH**
• 40+ year olds (13%) – 60+ year olds (5%) – retirees (3%) – empty nesters (9%) – 1-2 person homes (16%) • Home-makers (18%) • Lower income earners ($20-$50,000 – 17%)	• 15-34 year olds (53%) – 15-24s (65%) – students (61%) – flatting (39%) • Young singles/couples, no kids (39%) • Families with kids 15+ (44%) • 3+ person homes (39%) • Lowest income earners (up to $20,000 – 34%) • Highest income earners ($150,000+ - 40%) • Māori (38%) • Smart TV connected to Internet (34%) • Chromecast homes (36%) • SVOD homes (38%) • Games console in home (46%)

TVNZ OnDemand (21% overall)	
LESS LIKELY TO WATCH	**MORE LIKELY TO WATCH**
• Males (17%) • 60+ year olds (16%) – older, living alone (13%) – single person homes (14%) • Students (15%) • Lowest income earners (up to $20,000 – 12%) • SKY TV homes (16%)	• Females (24%) • Upper white collar workers (26%) • Highest income earners ($150,000+ - 29%) • Chromecast homes (26%)

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
Working TV 78% overall	• Flatting (60%) • Student (69%) • Young singles/couples, no kids (68%) • Pre-school families (69%) • Home-makers (64%) • Lowest income earners (up to $20,000 = 70%) • Asian (55%) • Aucklanders (71%)	• 65+ year olds (88%) – retirees (88%) – Empty nesters (83%) • Highest income earners ($120,000+ - 82%) • Māori (84%)
Radio 61% overall	• 15-39 year olds (46%) – students (47%) – flatting (31%) • Single & double income couples, no kids (34%) • 3+ person homes (54%) • Families with pre-school kids (41%) • Unemployed (54%) • Lower white collar workers (53%) • Lowest income earners (up to $20,000 – 52%) • Asian (35%) • Aucklanders (57%)	• 55+ year olds (79%) – 65+ year olds (86%) – retirees (84%) – empty nesters & older singles (78%) – Single person homes (74%) • Lower income earners ($20-$50,000 – 67%) • Pakeha (67%)
SKY TV 33% overall	• 15-34 year olds (17%) – students (17%) – flatting (18%) • Single & double income young couples, no kids (12%) • Home-makers (23%) • 3+ person homes (27%) • Low income earners (up to $30,000 – 28%) • Asian (12%) • Aucklanders (28%)	• 50+ year olds (47%) – empty nesters (45%) – retirees (47%) • Higher income earners ($80,000+ = 38%) • Māori (47%)

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
PVR 27%	• 15-34 year olds (17%) – 25-34s (13%) – students (20%) – flatting (22%) • Young singles & couples, no kids (13%) • Home-makers (20%) • Asian (11%)	• 50+ year olds (35%) – retirees (34%) – empty nesters (33%) – 2 person homes (33%) • Families with kids aged 15+ (34%) • High income earners ($120k+ = 35%) • Māori (38%)
Smart TV connected to internet 46% overall	• 65+ year olds (39%) – retirees (36%) – older singles (29%) – single person homes (30%) • Low income earners (up to $30k = 32%) • Flatting (30%) • Solo parents (35%) • Young singles/couples, no kids (43%)	• 35-44 year olds (54%) • Upper white collar workers (53%) • High income earners ($80k+ = 60%) • Families (55%) – 4+ person homes (55%)
Chromecast 37% overall	• 60+ year olds (21%) – retirees (20%) – empty nesters (25%) – single person homes (19%)l • Home-makers (29%) • Unemployed (28%) • Lowest income earners (up to $20,000 – 27%)	• 15-44 year olds (45%) • 5+ person homes (45%) • Blue collar workers (43%) • Upper white collar workers (43%) • High income earners ($80k+ = 49%)

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
Games console 27% overall	• Females (21%) • 45+ year olds (11%) – 60+ year olds (5%) – retirees (4%) – empty nesters (5%) – 1-2 person homes (14%) • Home-makers (20%)	• Males (33%) • 15-44 year olds (42%) – 15-24s (49%) – Students (45%) • Young couples, no kids (39%) • Families (40%) – Families with school aged kids (43%) • 3+ person homes (39%) • Blue collar workers (35%) • Highest income earners ($150,000+ = 37%) • Māori (38%) • Pasifika (35%)