

A photograph of a young man and woman sitting on a couch, smiling and holding red mugs. The man is holding a remote control. In the background, a clock is visible on the wall.

WHERE ARE THE **AUDIENCES?** Lower socio-economic report

SEPTEMBER 2020

- Te Hiringa Hauora aims to inspire all New Zealanders to lead healthier lives. It leads and delivers innovative, high quality and cost-effective programmes in the following areas:
 - Alcohol, health education resources, immunisation, mental health, minimising gambling harm, nutrition and physical activity, skin cancer prevention, tobacco control, workplace well-being.
- It achieves these objectives by:
 - Promoting health and well-being
 - Enabling health promotion initiatives and environments
 - Informing health promotions policy and practice
- Therefore effectively reaching key New Zealand audiences is critical to achieving Te Hiringa Hauora's objectives and mission. New Zealand On Air's (NZ On Air) two yearly "Where Are The Audiences?" study is an important input for Te Hiringa Hauora to understand how to reach New Zealanders overall and harder to reach audiences in particular. These audiences are:
 - 15-24 year olds
 - Māori
 - Pacific Island peoples
 - Lower socio-economic groups
- **This report summarises the results from 2020 "Where Are The Audiences?" study based on lower socio-economic groups.**

- 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 interviewing for the 2020 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 therefore 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 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.

- **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.
- The NZ On Air main study developed a total sample of n=1,511 New Zealanders aged 15 and over, with representative samples created for each day of the week so that results can be accurately extrapolated to represent a “typical” day.
- **The study included a sub-sample of N=275 New Zealanders from lower socio-economic groups on which this report is based.**
- The total sample has a maximum margin for error of +/-2.5%, and the sample of lower socio-economic groups has a maximum margin for error of +/-5.9%.

- **Based on the questions asked in the study, the lower socio-economic group has been defined as:**
 - New Zealanders who earn up to \$50,000 personal income, or combined income if they have a partner. This includes people with no income.
 - Retirees and students were then excluded to create the lower socio-economic group.
 - Socio-economic level is usually based on classifying respondents in to one of six levels based on the occupation of the home's main income earner. However this question is not included in the NZ On Air study so a different definition was required.
- Results have been compared to all New Zealanders 15+ and to the 2018 results among lower socio-economic groups.
 - No comparison to the 2016 study is possible as the income questions were asked in a different way prior to 2018

- As in previous years a mixed methodology of telephone and online interviewing was used to conduct the main NZ On Air study.
- 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.
 - This included regional stratification and minimum quotas for males, 15-24 year olds and ethnicity.
- 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 900:600 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 was representative of the 15+ NZ population;
 - Access to a landline, gender, age, ethnicity.

- 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.
- 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	Consumption of extra online material related to a TV show

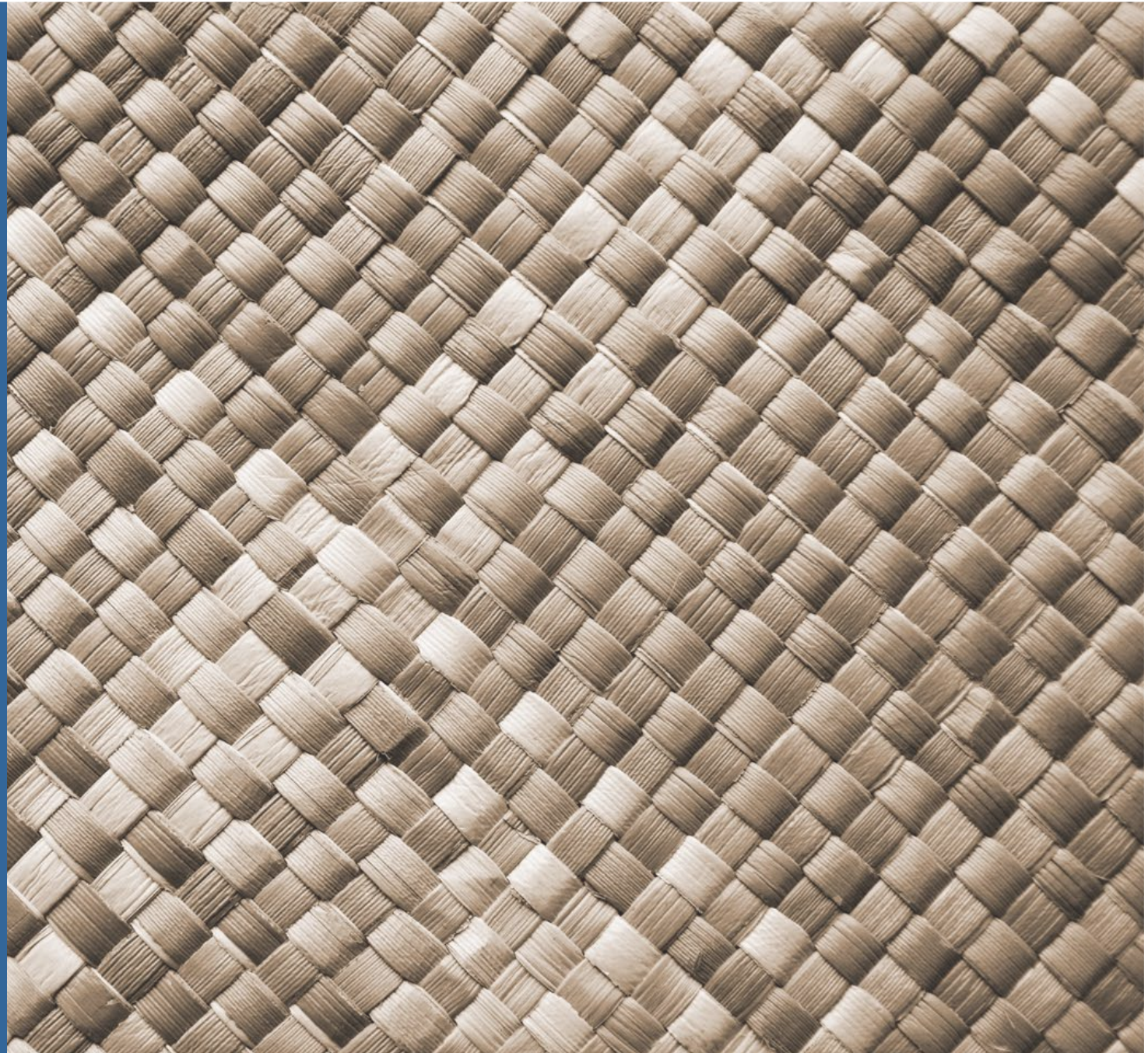
Abbreviations used in charts

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 <u>not</u> 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



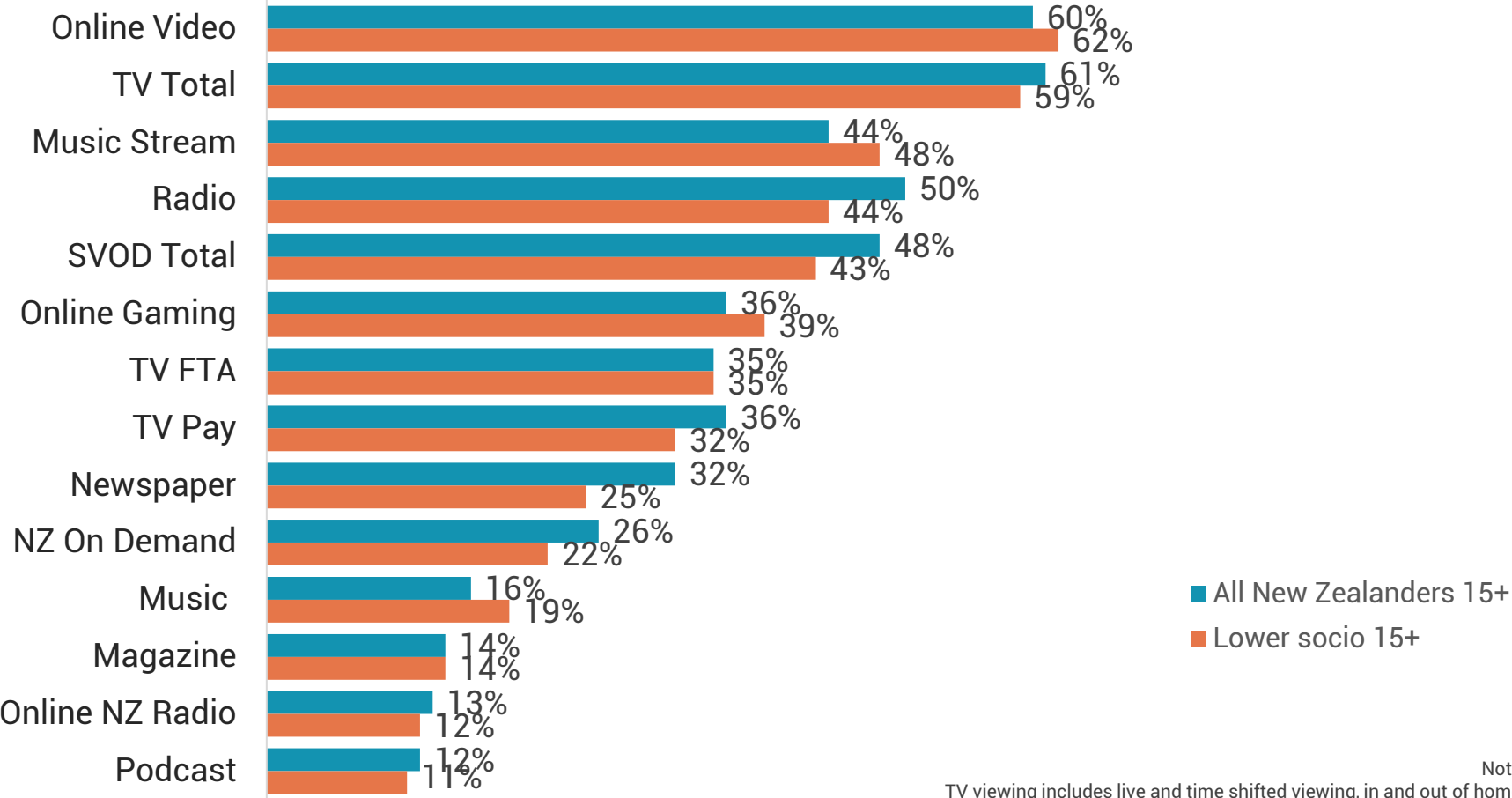
- On many measures the daily media behaviour of lower socio groups is not significantly different to overall New Zealanders 15+.
- They are therefore at the cross-over point between digital and traditional media attracting the largest daily audiences in New Zealand.
- However the rate of change in daily audiences may be slower among lower socio groups.
- There is perhaps more rapid change evident in the time lower socio groups spend with different media each day – with digital media starting to overtake all but TV in terms of time spent.
- There are indications that lower socio groups have slightly less access to nearly all devices and platforms than average, which may be holding back their switch to digital media. However access to key devices and services is changing rapidly and perhaps signals that lower socio groups will only lag slightly behind overall New Zealanders 15+ - if at all.

Daily reach 2020. The overall daily media use of lower socio groups is similar to the behaviour of New Zealanders 15+ overall, with no statistically significant differences in daily reach between the two groups in 2020.



Daily reach of media 2020 – All New Zealanders 15+ and lower socio 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.



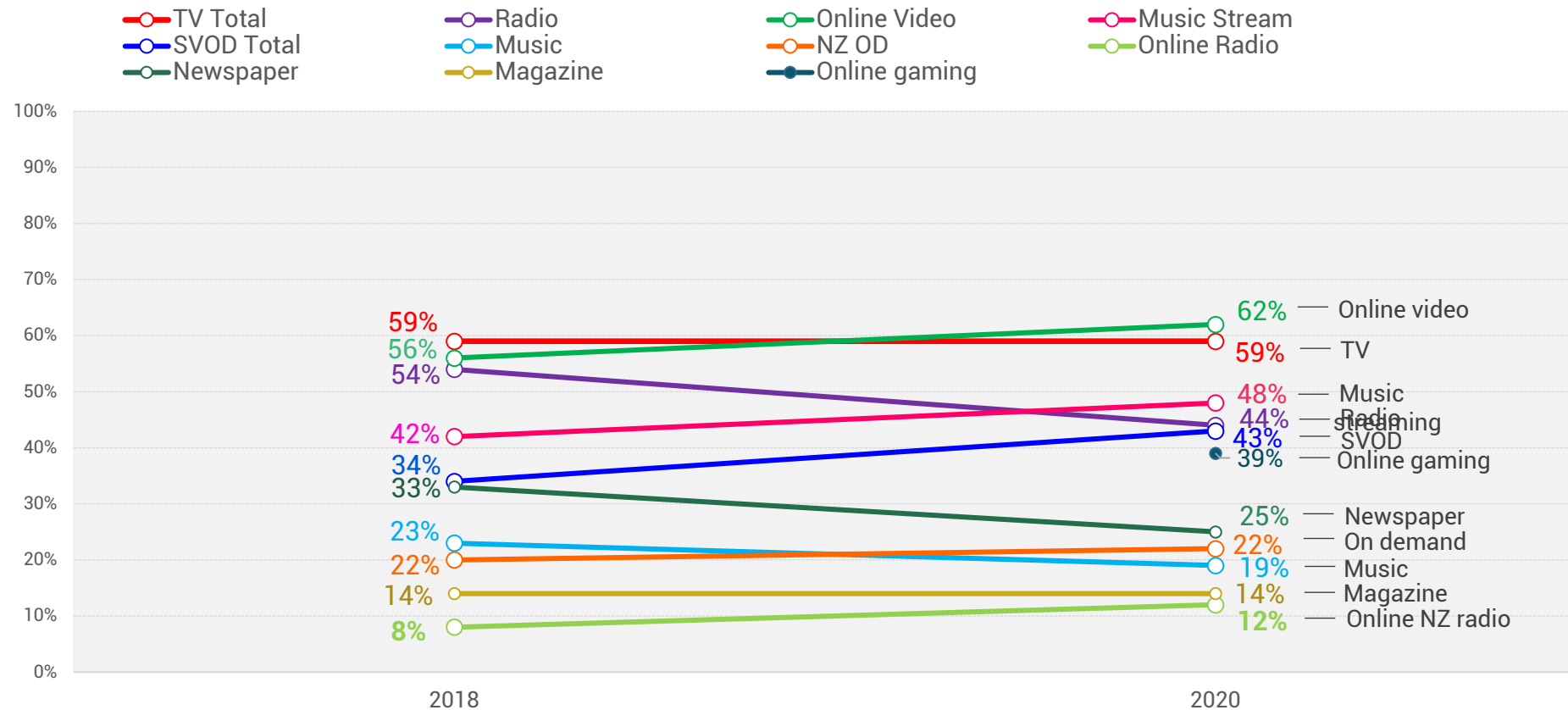
- ▶ Six in ten New Zealanders from lower socio groups watch online video or TV each day.
- ▶ Four in ten or more listen to streamed music or the radio, watch SVOD each day, or play online gaming.
- ▶ About one in four read newspaper or watch on demand each day.

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

Daily reach over time. Media usage has been relatively stable since 2018 among lower socio groups compared to overall New Zealanders 15+ (eg. TV). However some traditional media (eg. radio, newspaper) has declined, and some digital media (eg. SVOD) has increased its daily audience since 2018.

Daily reach of media over time – All lower socio 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



Notes:
TV viewing includes live and time shifted viewing, in and out of home.
Online gaming first included in 2020.
Unable to compare to 2016 due to 2018 change in how income question was asked.

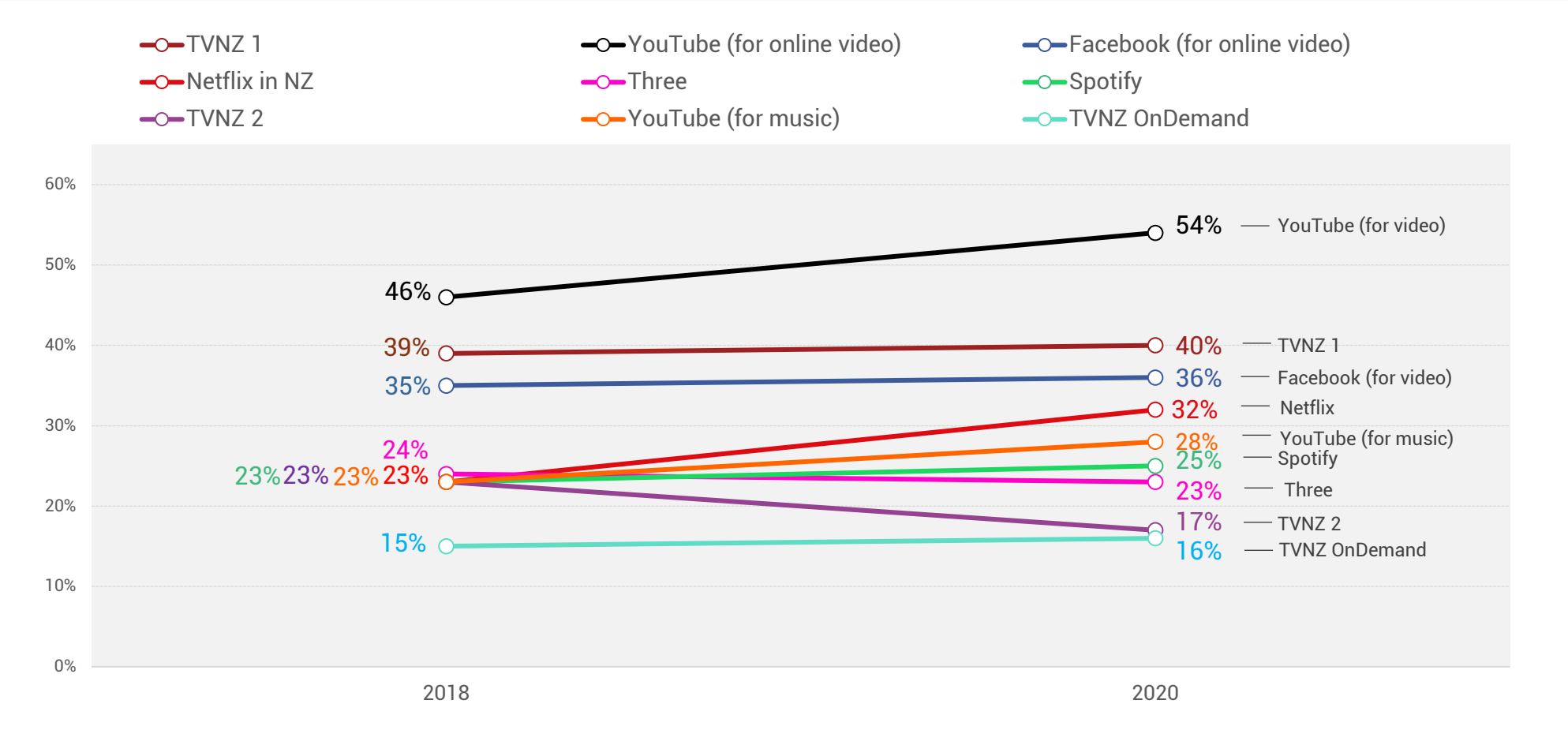
Overall the daily media behaviour of lower socio groups reflects overall New Zealanders 15+ in terms of 2020 likely being the cross-over point between digital media and traditional media attracting the biggest daily audiences in New Zealand.

- In terms of the overall media behaviour of lower socio groups in 2020, there is a great deal of similarity to the behaviour of overall New Zealanders 15+. It appears this group are also at the point of cross-over between digital media and traditional media attracting the biggest daily audiences.
 - An example is the similarity in how media use changes over the course of a day compared to the behaviour of overall New Zealanders.
- However compared to overall New Zealanders 15+, the daily audience using traditional media appears to be declining less rapidly and the digital media audience growing more slowly.
 - For example the daily reach of some of the most popular channels, sites and stations has not changed significantly since 2018, including TVNZ 1, Three, Facebook (for video), Spotify, and TVNZ OnDemand.
- There is perhaps more significant change occurring in the time lower socio groups dedicate to some media each day.
 - For instance, time spent listening to the radio has fallen significantly since 2018, while the time spent watching SVOD, listening to streamed music or watching online video has increased significantly.
- YouTube has increased its lead as the most popular single site, channel or station since 2018, and Netflix has also grown to be the fourth most popular provider after TVNZ 1 and Facebook (for video).
- Lower socio groups have only slightly less access to devices and services that enable media consumption. However there is significant change evident in access to some devices since 2018 and which may signal future change in media behaviour.
 - Access to a working TV or radio has fallen significantly, while access to Netflix, a games console, smart TV and Chromecast has increased.

Most popular channels, sites and stations 2020. Again there is relative stability in the most popular channels, sites and stations among lower socio groups. However YouTube (for video) has increased its audience size and its lead as the most popular site, station or channel among lower socio groups. Netflix has also increased its daily audience since 2018 while TVNZ 2 has declined.

Most popular channels, sites & stations – all lower socio 15+.

Q: Which of the following did you use yesterday?



- Next five:
- Prime 9%
 - Herald (for video) 9%
 - Stuff (for video) 8%
 - Radio NZ 7%
 - Disney Plus 7%



Daily Media Consumption

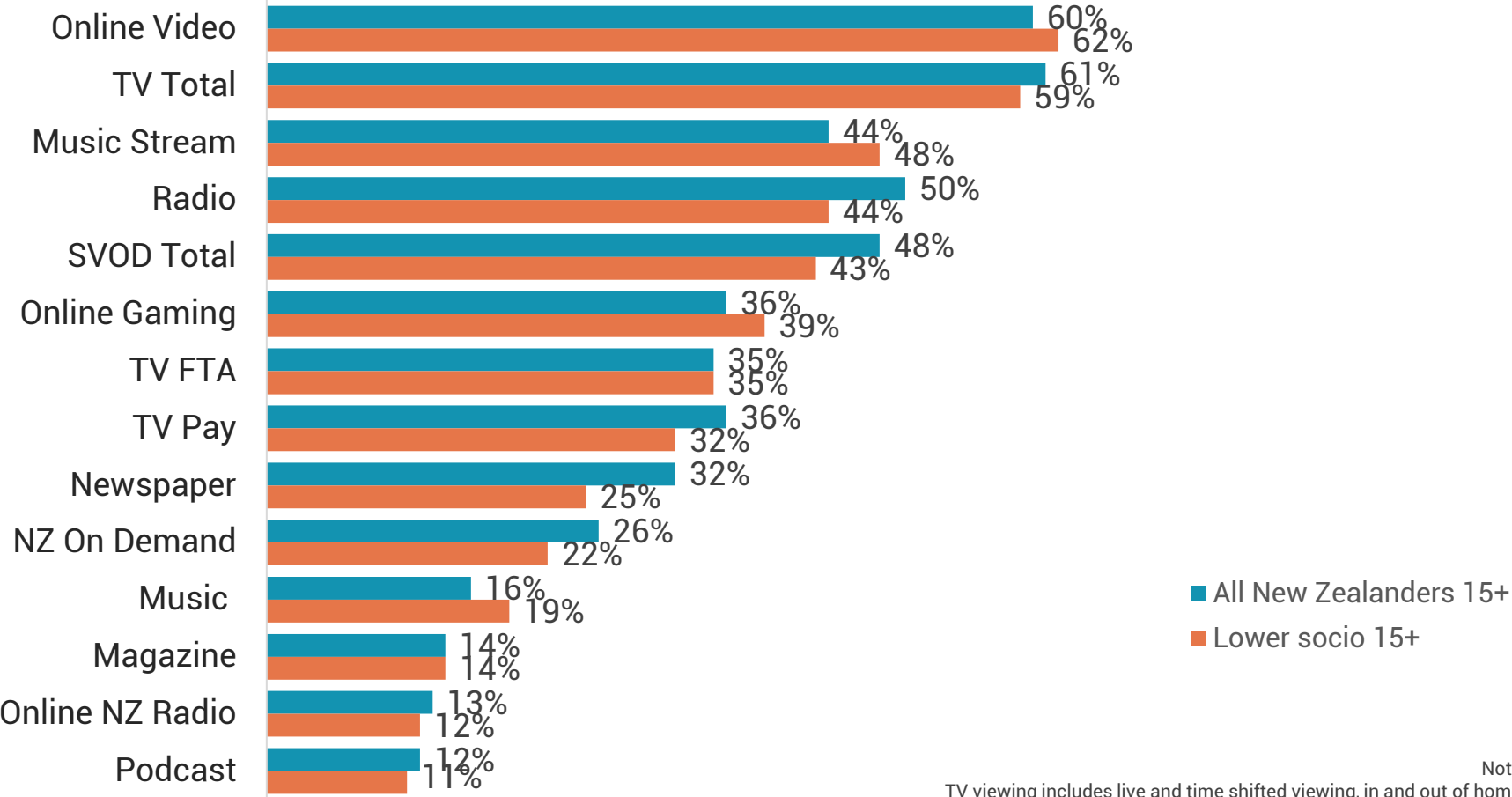


The overall daily media use of lower socio groups is similar to the behaviour of New Zealanders 15+ overall, with no statistically significant differences in daily reach between the two groups in 2020.



Daily reach of media 2020 – All New Zealanders 15+ and lower socio 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.



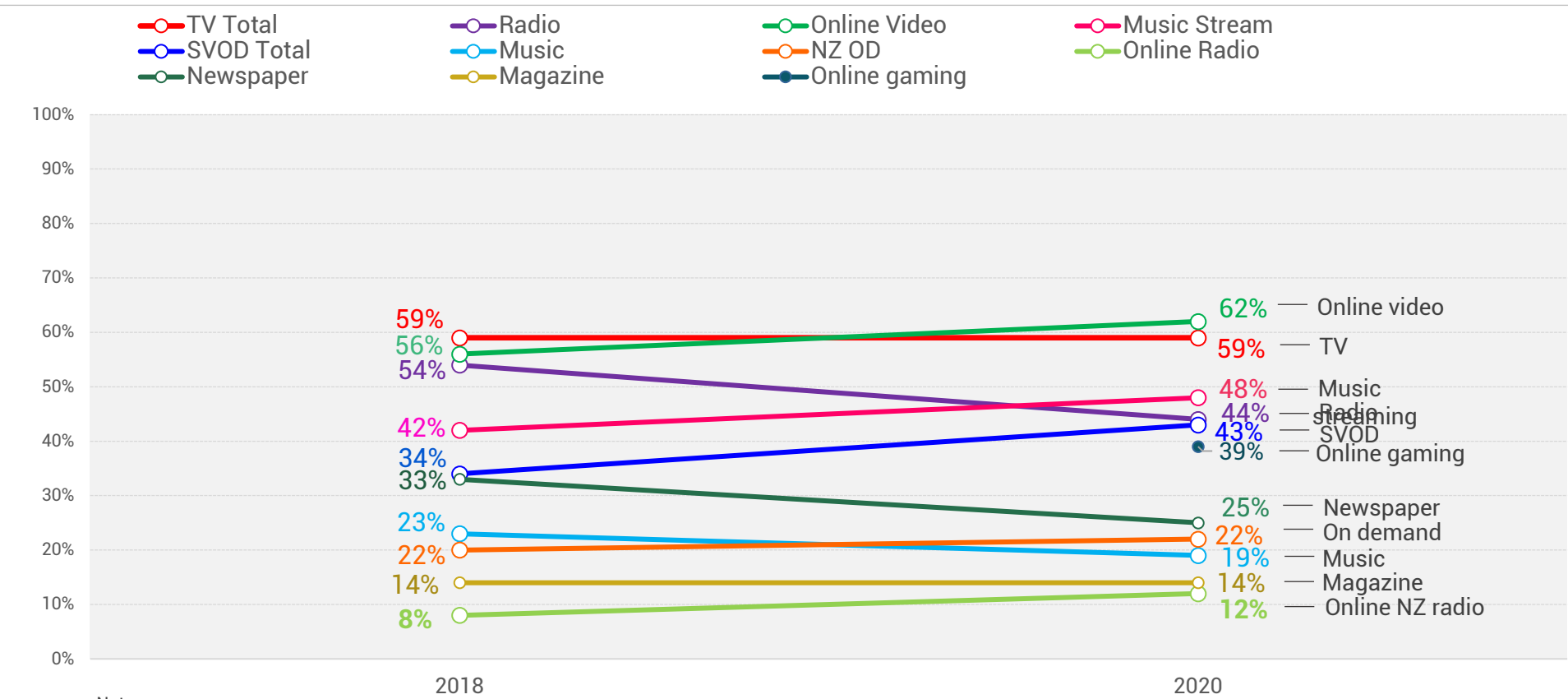
- ▶ Six in ten New Zealanders from lower socio groups watch online video or TV each day.
- ▶ Four in ten or more listen to streamed music or the radio, watch SVOD each day, or play online gaming.
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Note:
TV viewing includes live and time shifted viewing, in and out of home.

Media usage has been relatively stable since 2018 among lower socio groups compared to overall New Zealanders 15+ (eg. TV). However some traditional media (eg. radio, newspaper) has declined, and some digital media (eg. SVOD) has increased its daily audience since 2018.

Daily reach of media over time – All lower socio 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



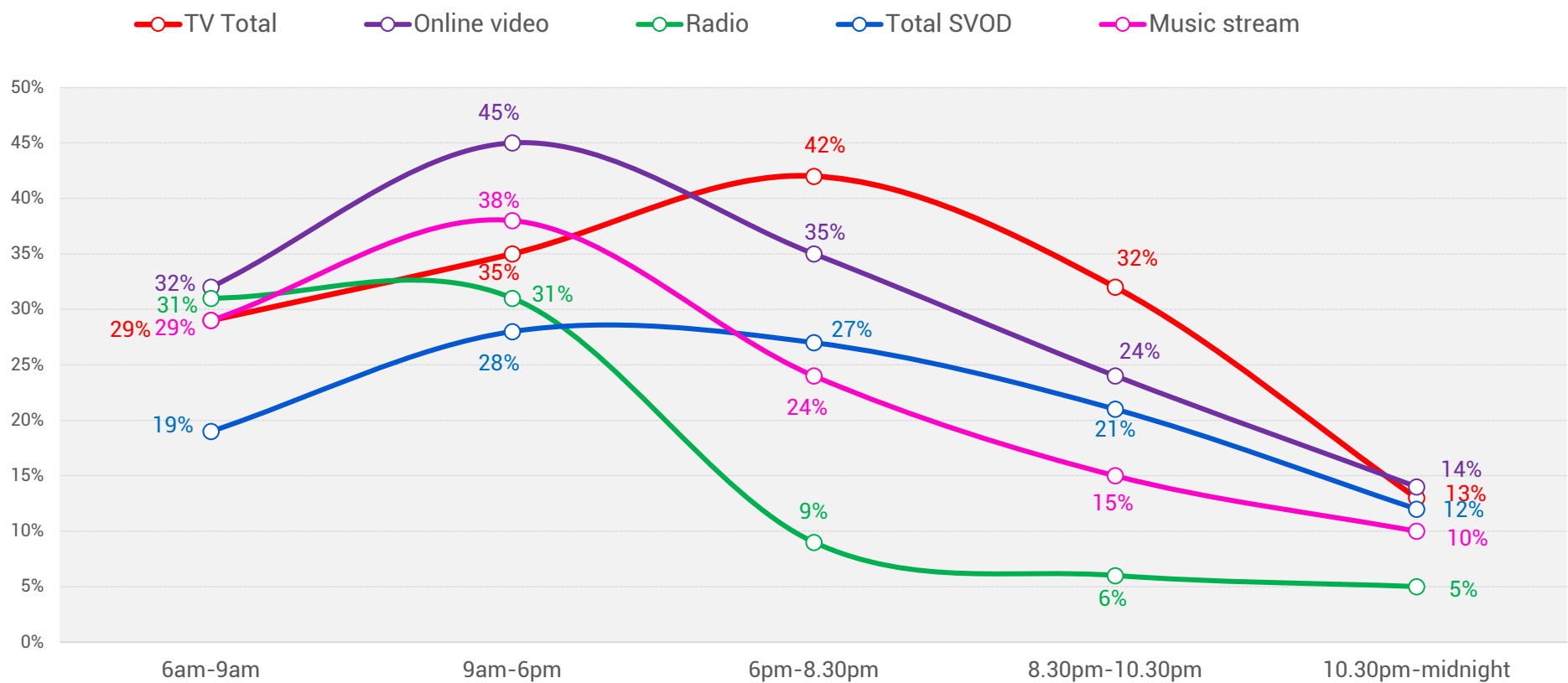
Notes:
 TV viewing includes live and time shifted viewing, in and out of home.
 Online gaming first included in 2020.
 Unable to compare to 2016 due to 2018 change in how income question was asked.

Overall the daily media behaviour of lower socio groups reflects overall New Zealanders 15+ in terms of 2020 likely being the cross-over point between digital media and traditional media attracting the biggest daily audiences in New Zealand.

The way lower socio groups use media changes over the day. Online video, radio, TV and music streaming are each used by three in ten in lower socio groups between 6-9am. Online video is then the most popular media between 9am - 6pm but is overtaken by TV during the traditional peak time of 6pm – 8.30pm.

Reach of media over the day 2020 – all lower socio 15+.

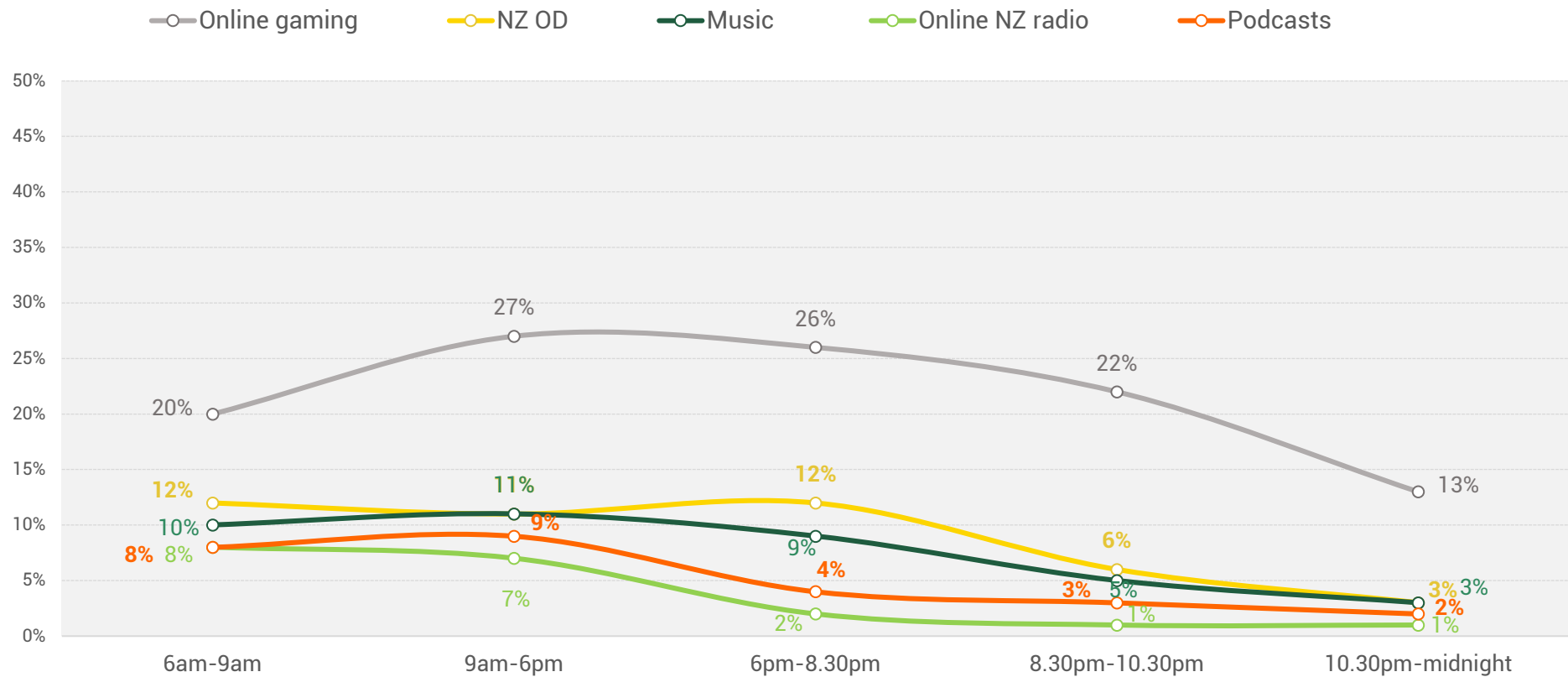
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Online gaming attracts very similar sized audiences as SVOD throughout the day. On demand and music (physical formats) are the only other media to reach one in ten or more lower socio groups during any period of the day.

Reach of media over the day 2020 – all lower socio 15+.

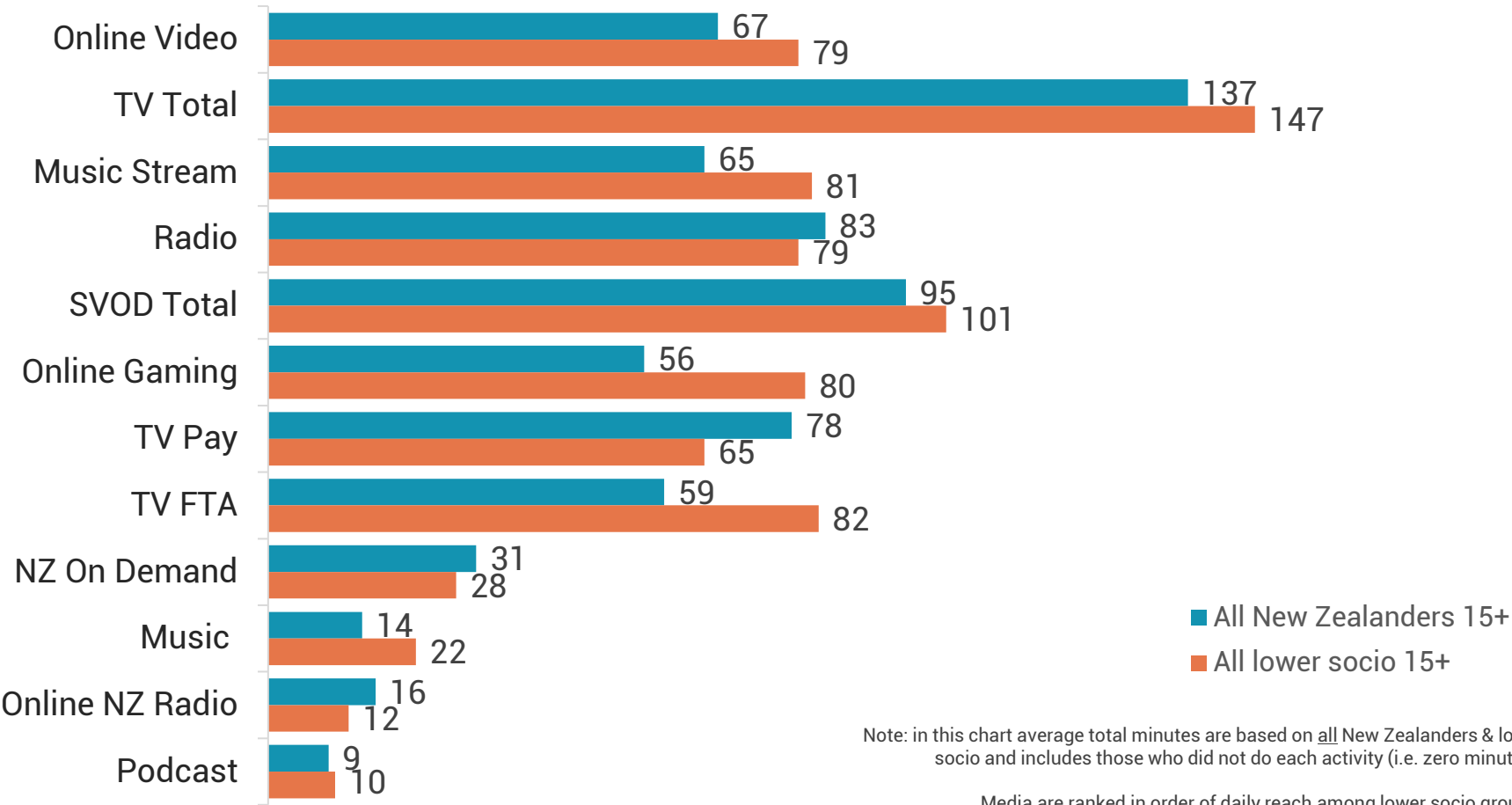
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Again there are few significant differences between lower socio groups and overall New Zealanders 15+. Lower socio groups dedicate the most time each day to TV – about 2½ hours. After this SVOD receives the second most time each day, with online video, music streaming, radio and online gaming each receiving just over an hour of time each day.

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

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



As with the overall population, online video attracts the equal biggest audience each day but New Zealanders continue to spend less time with this media than TV and SVOD.

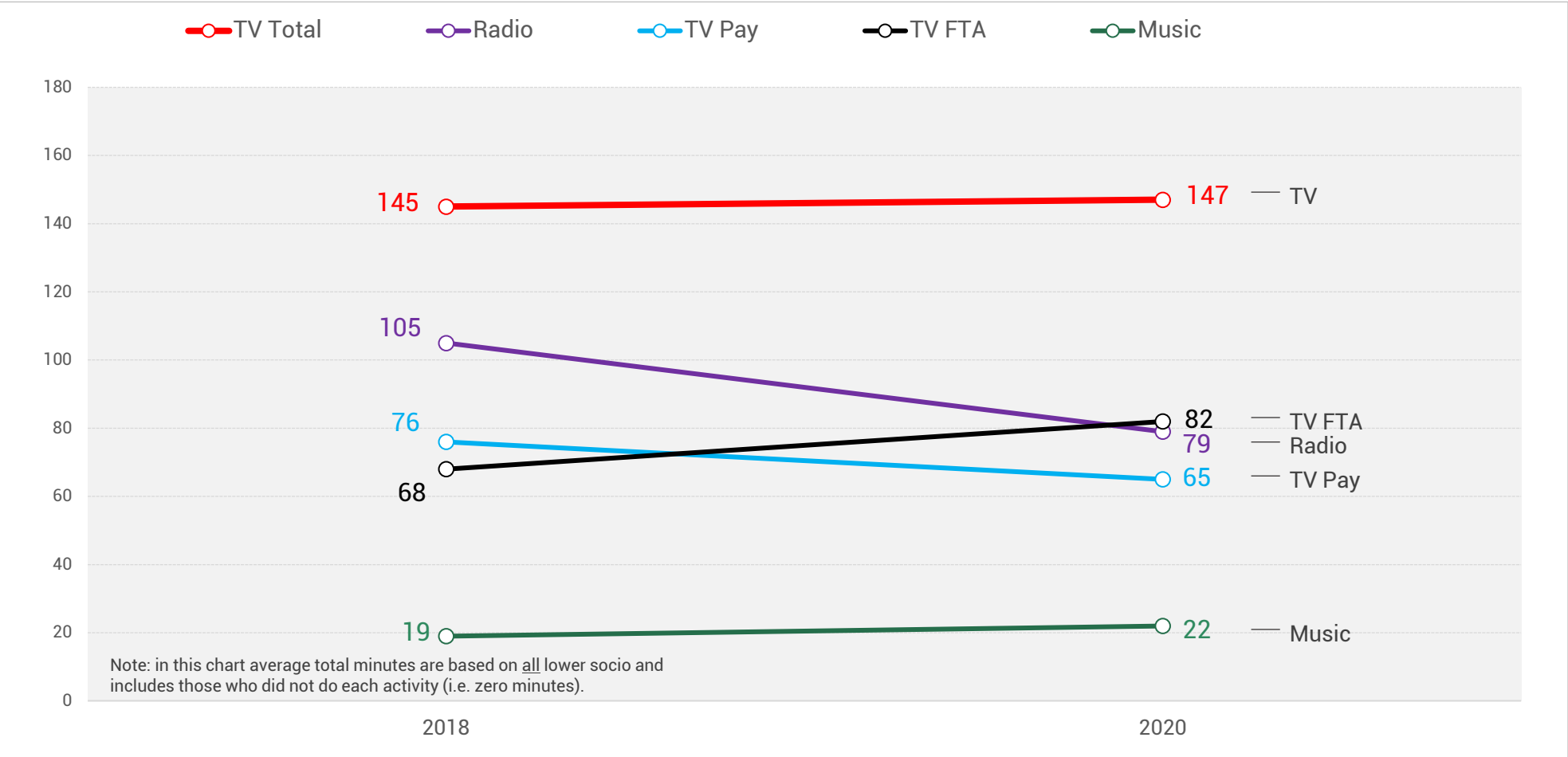
Note: in this chart average total minutes are based on all New Zealanders & lower socio and includes those who did not do each activity (i.e. zero minutes).

Media are ranked in order of daily reach among lower socio groups.

Time spent watching TV overall has been relatively stable since 2018, though this is the overall outcome of a lift in time spent viewing via the free to air platform and a decline in time spent viewing on a pay TV platform. The time lower socio groups spend listening to the radio has declined since 2018.

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

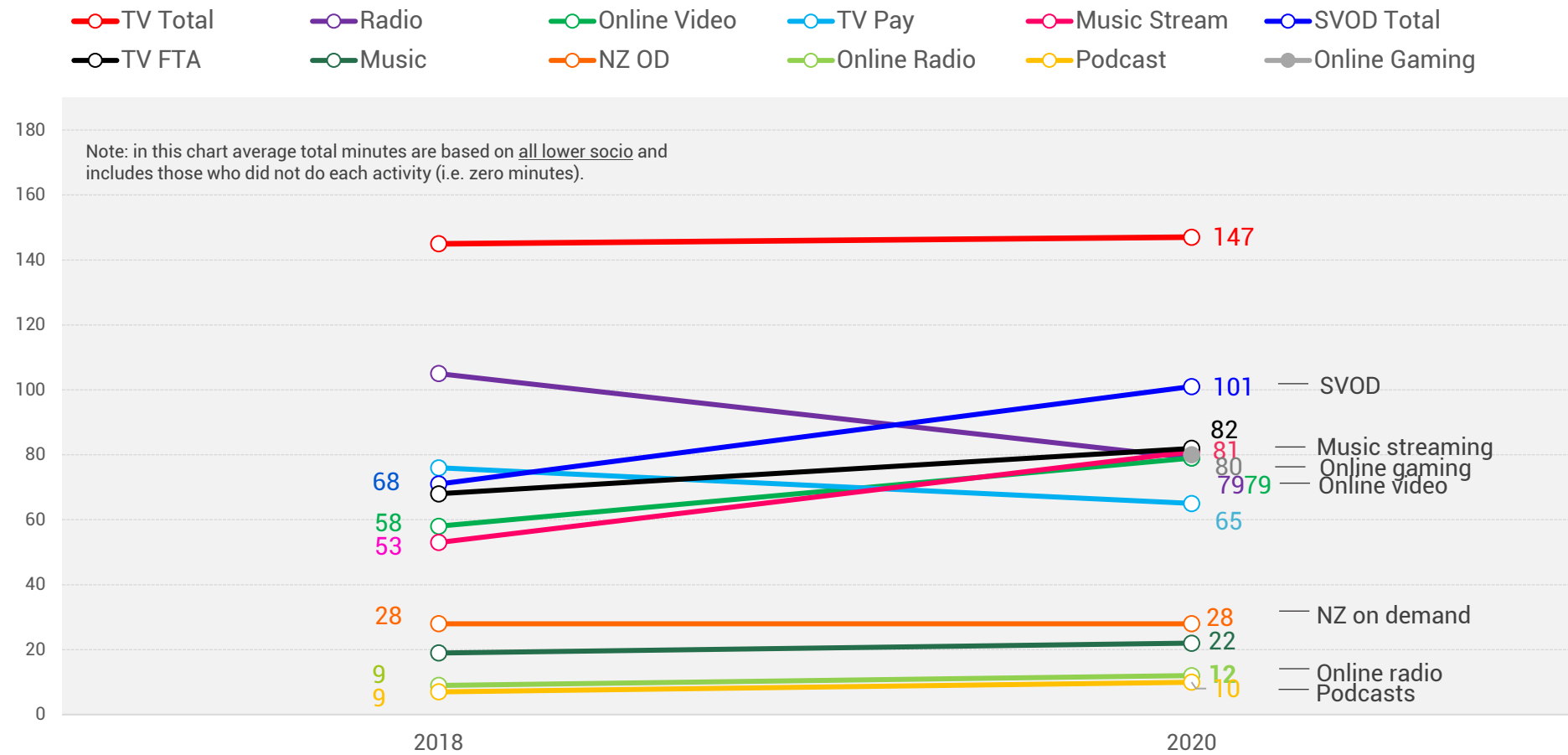
Q: Between (TIME PERIOD) about how long did you do (activity) for?



SVOD, online video and music streaming all show significant growth among lower socio groups while radio and TV viewing on a pay TV platform decline. Time spent watching on demand is stable since 2018.

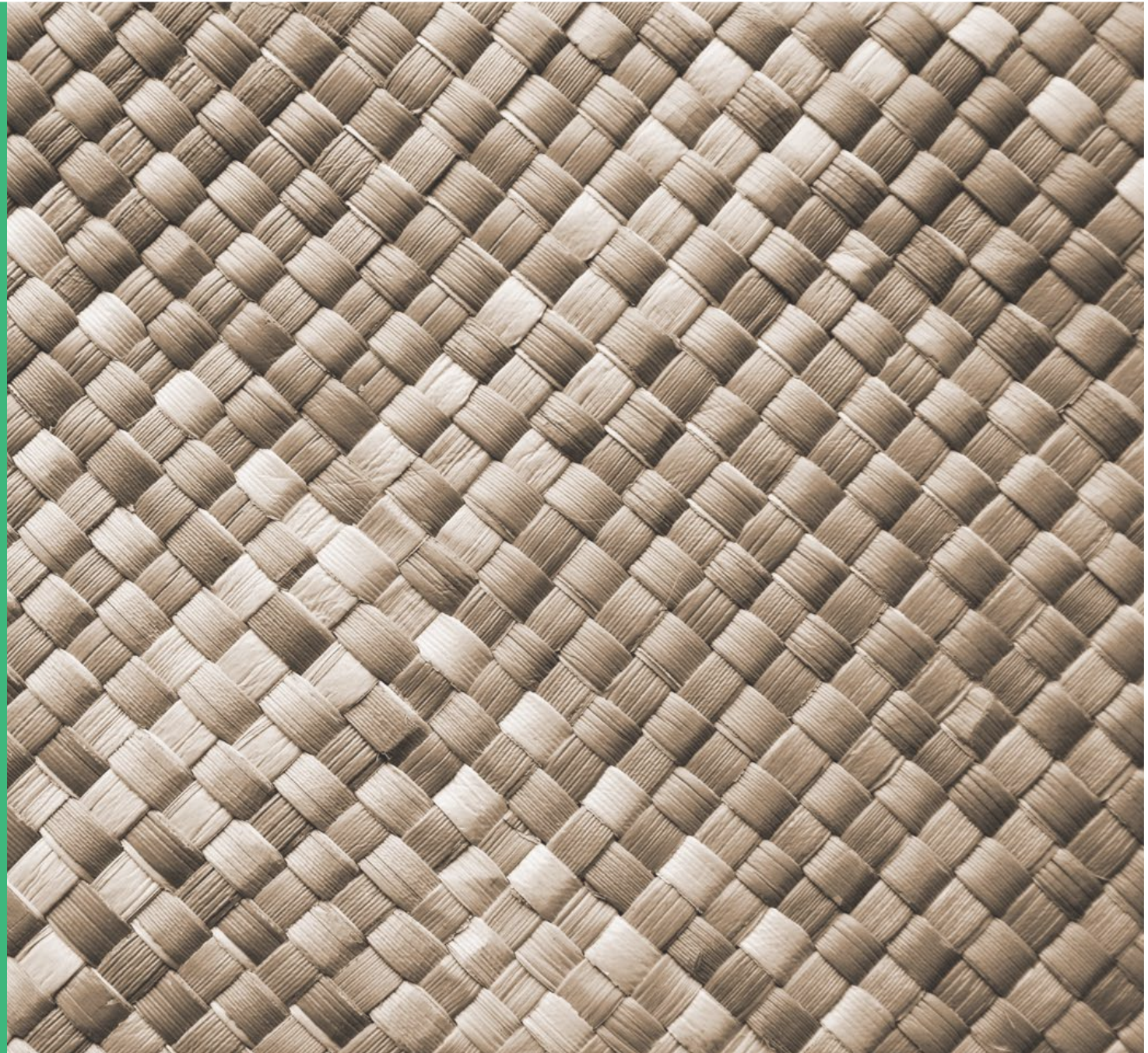
Time spent consuming all media over time – average minutes per day. All lower socio 15+.

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





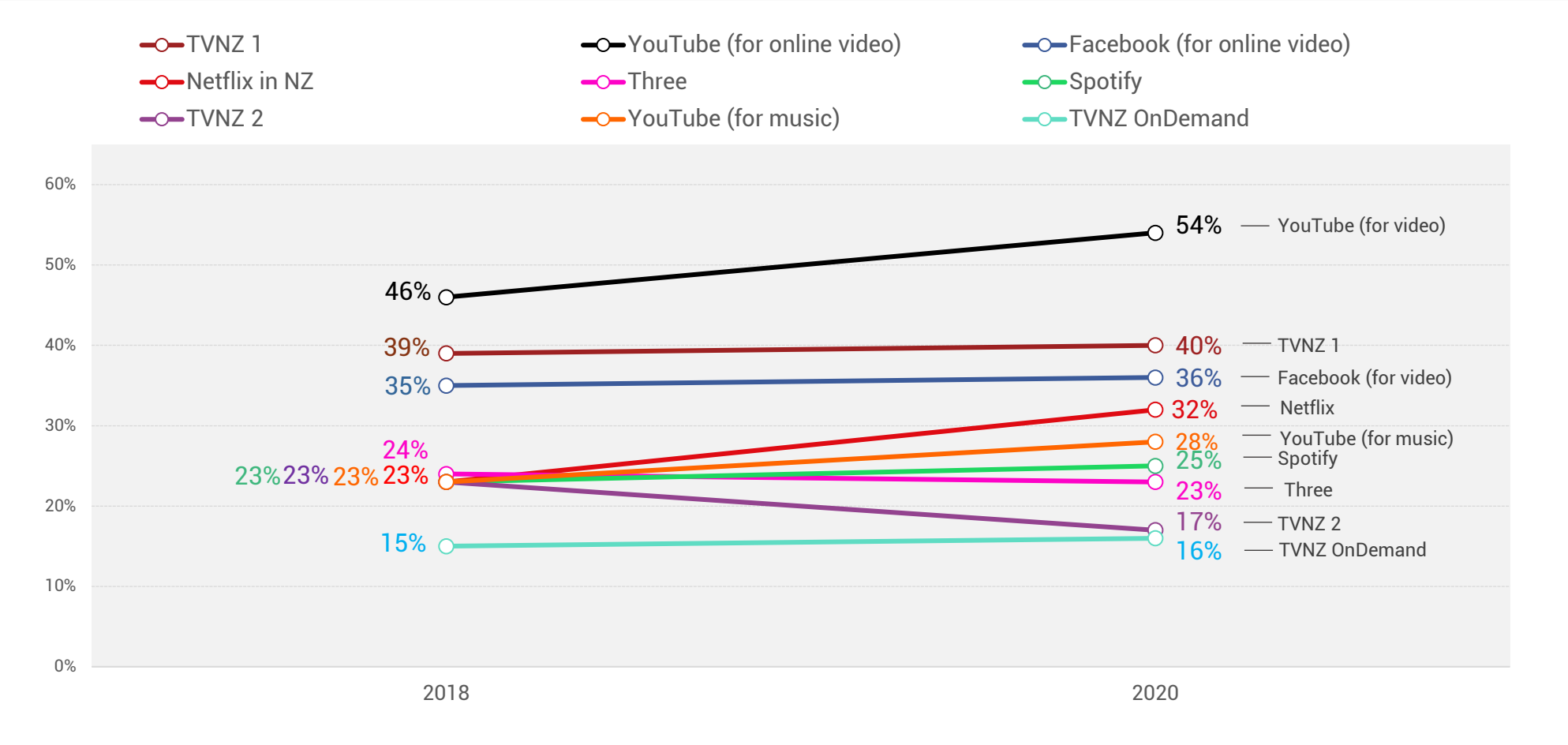
Daily Media Consumption By Channel, Site & Station



Again there is relative stability in the most popular channels, sites and stations among lower socio groups. However YouTube (for video) has increased its audience size and its lead as the most popular site, station or channel among lower socio groups. Netflix has also increased its daily audience since 2018 while TVNZ 2 has declined.

Most popular channels, sites & stations – all lower socio 15+

Q: Which of the following did you use yesterday?

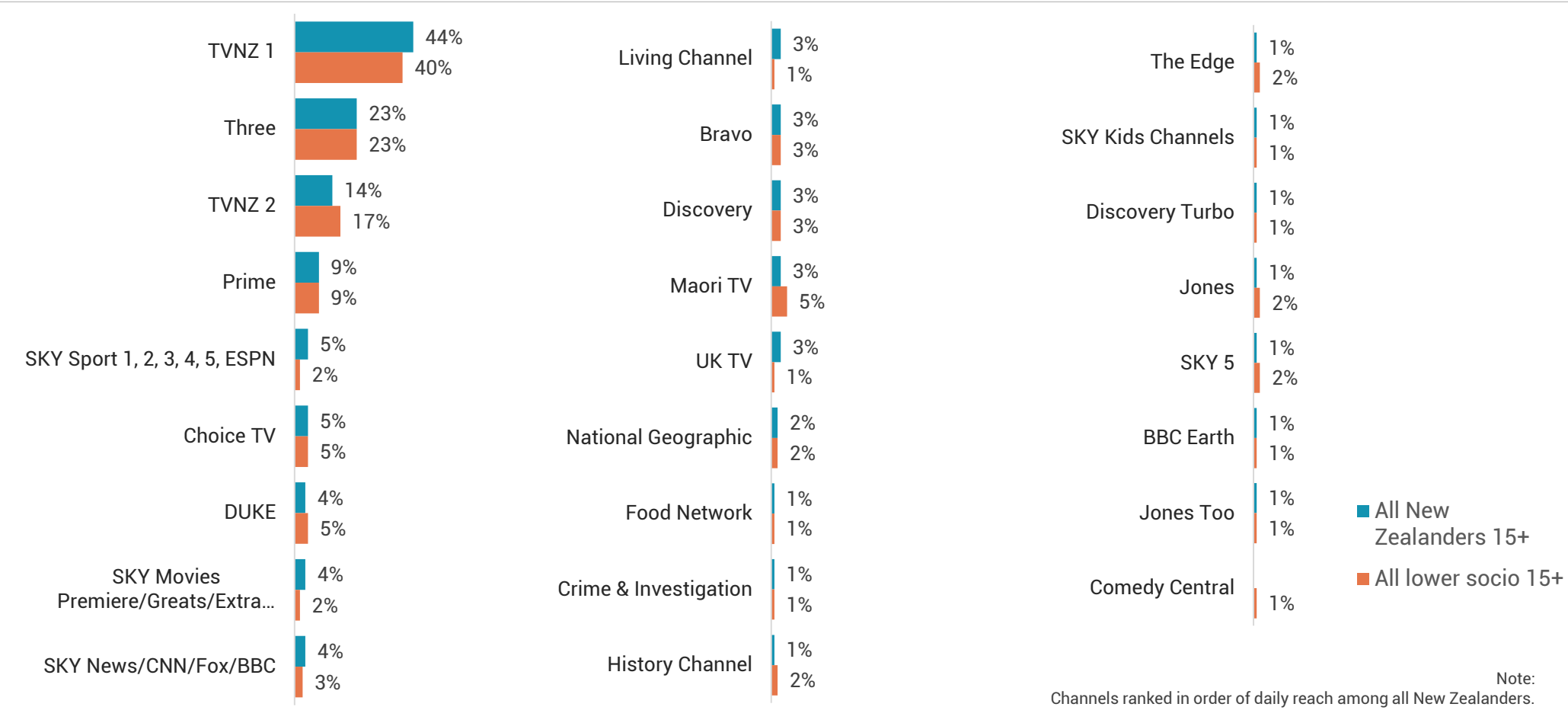


- Next five:
- Prime 9%
 - Herald (for video) 9%
 - Stuff (for video) 8%
 - Radio NZ 7%
 - Disney Plus 7%

Lower socio groups do not differ significantly from overall New Zealanders 15+ in terms of the TV channels they watch each day. TVNZ 1 is most popular with four in ten watching each day.

Daily reach of TV channels 2020 – all New Zealanders 15+ & all lower socio 15+.

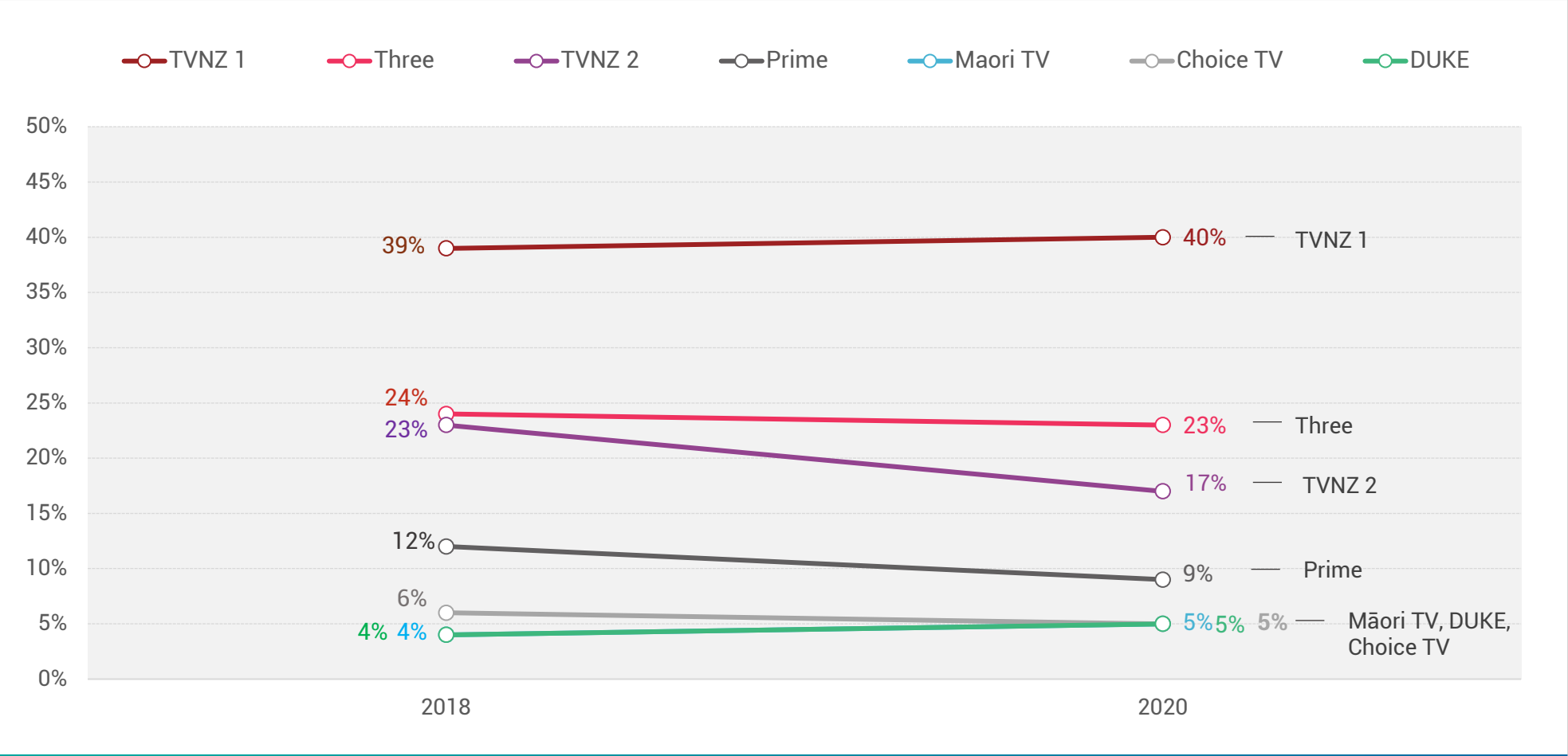
Q: Thinking about yesterday, which of the following TV channels did you watch?



The daily reach of the most popular TV channels among lower socio groups is stable since 2018, with the exception of the decline in TVNZ 2's audience.

Daily reach of TV channels (5% reach and over) – all lower socio 15+.

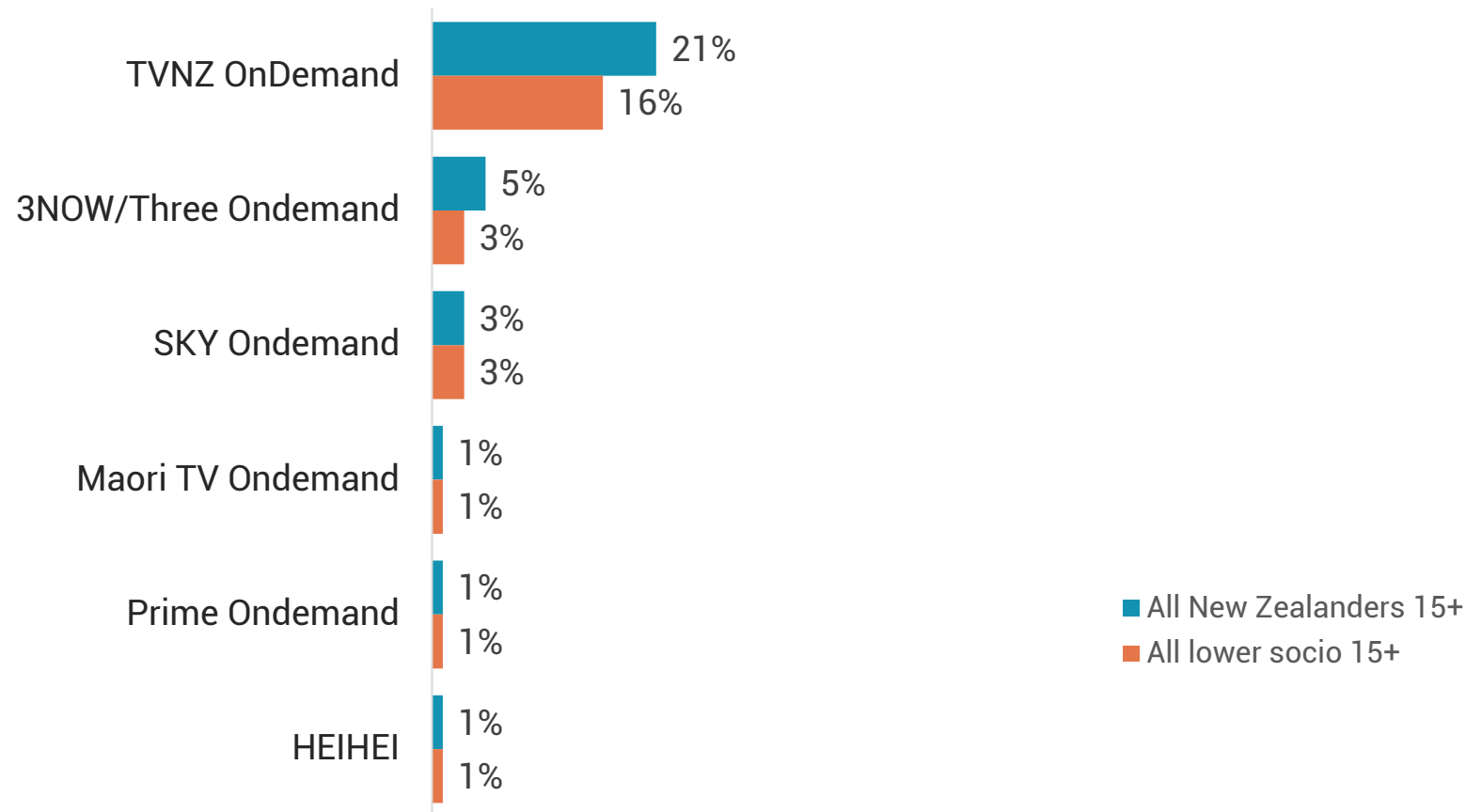
Q: Thinking about yesterday overall, which of the following TV channels did you watch?



TVNZ OnDemand is the most popular on demand site among lower socio groups. There are indications that lower socio groups are slightly less likely to watch TVNZ OnDemand each day, though this difference is not statistically significant.

Daily reach of on demand sites 2020 – All New Zealanders 15+ & all lower socio 15+.

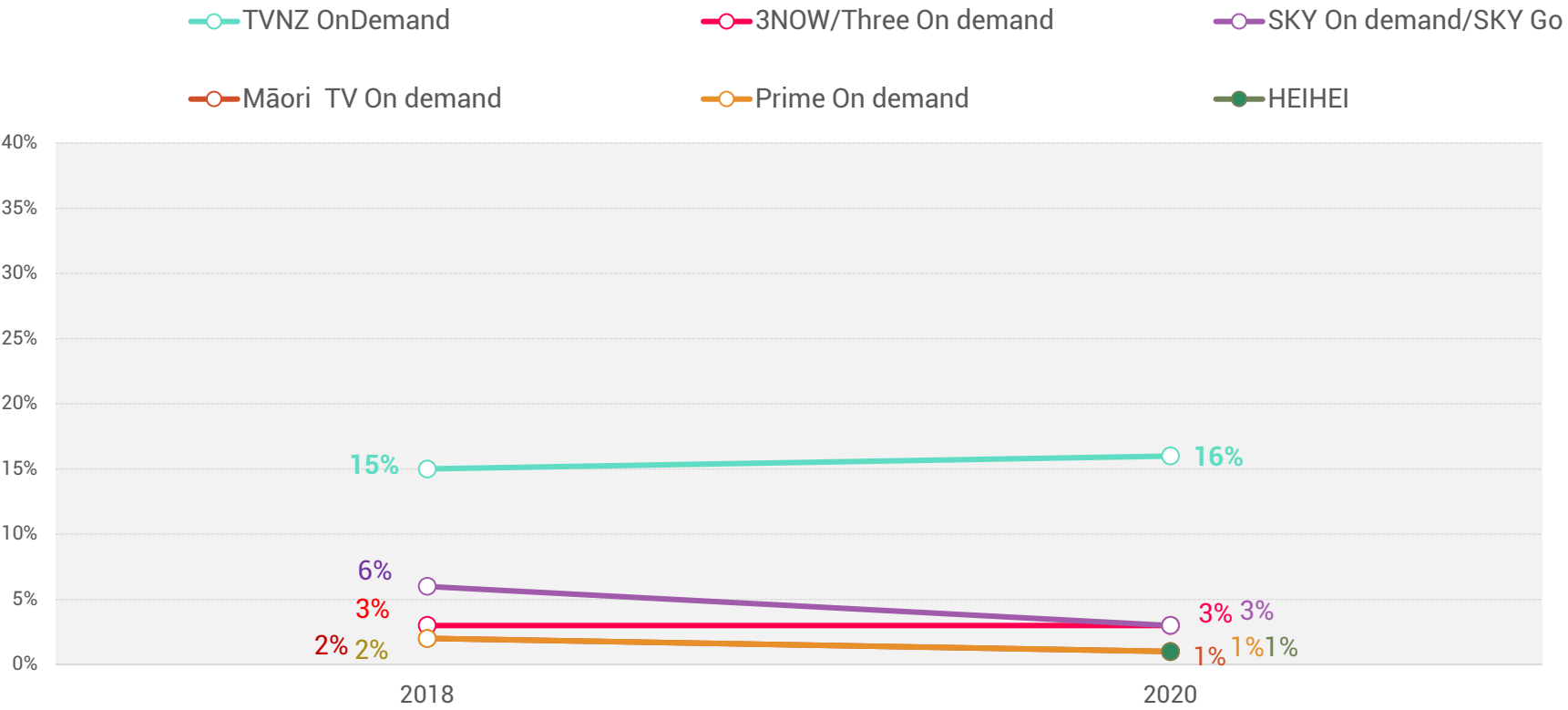
Q: Thinking about yesterday overall, which of the following websites did you watch?



As with other media, the daily audiences of on demand sites show very little change since 2018.

Daily reach of on demand sites – all lower socio 15+.

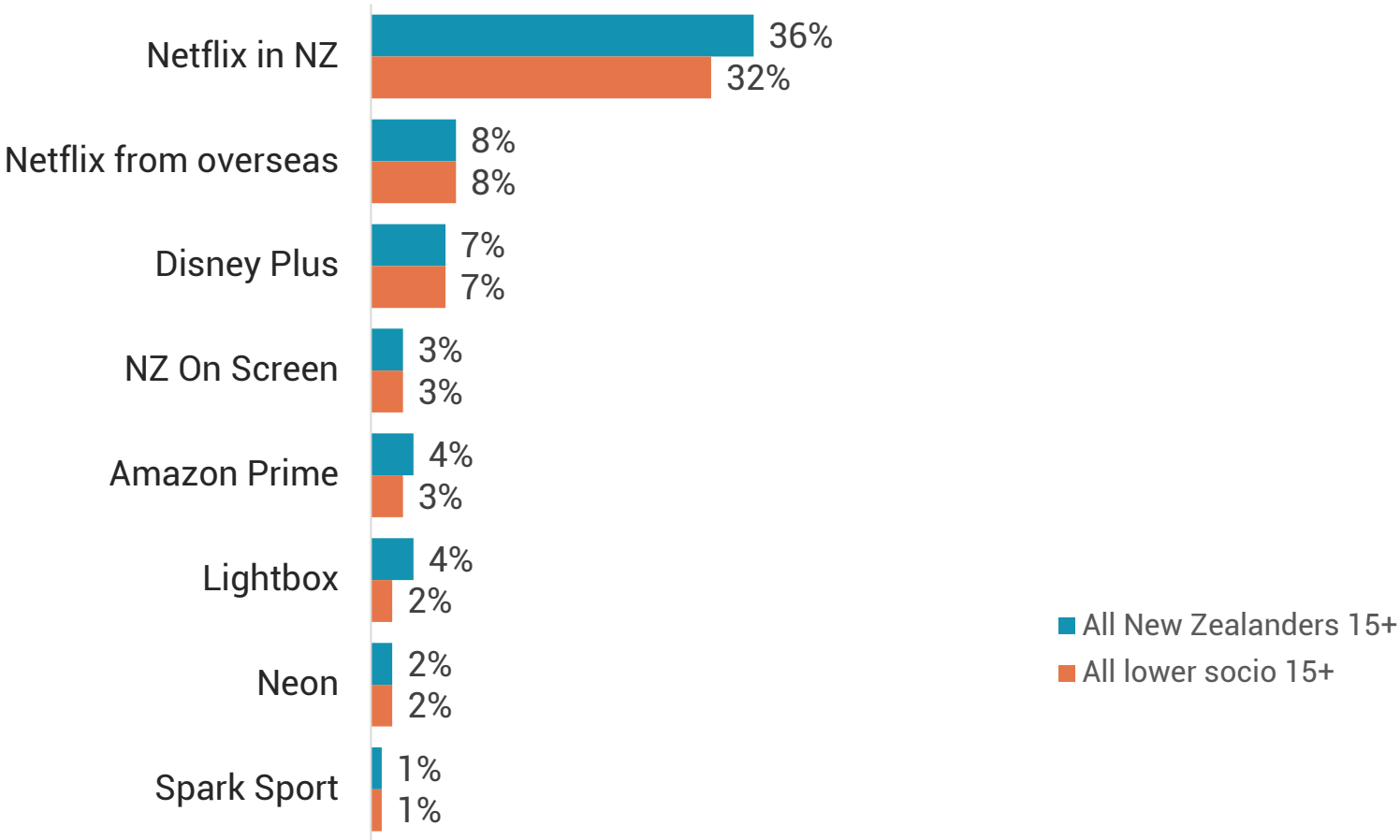
Q: Thinking about yesterday overall, which of the following websites did you watch?



The daily use of SVOD sites among lower socio groups is very similar to overall New Zealanders 15+. Netflix is the most popular by a significant margin, with one in three lower socio watching this provider each day.

Daily reach of SVOD sites 2020 – All New Zealanders 15+ & all lower socio 15+.

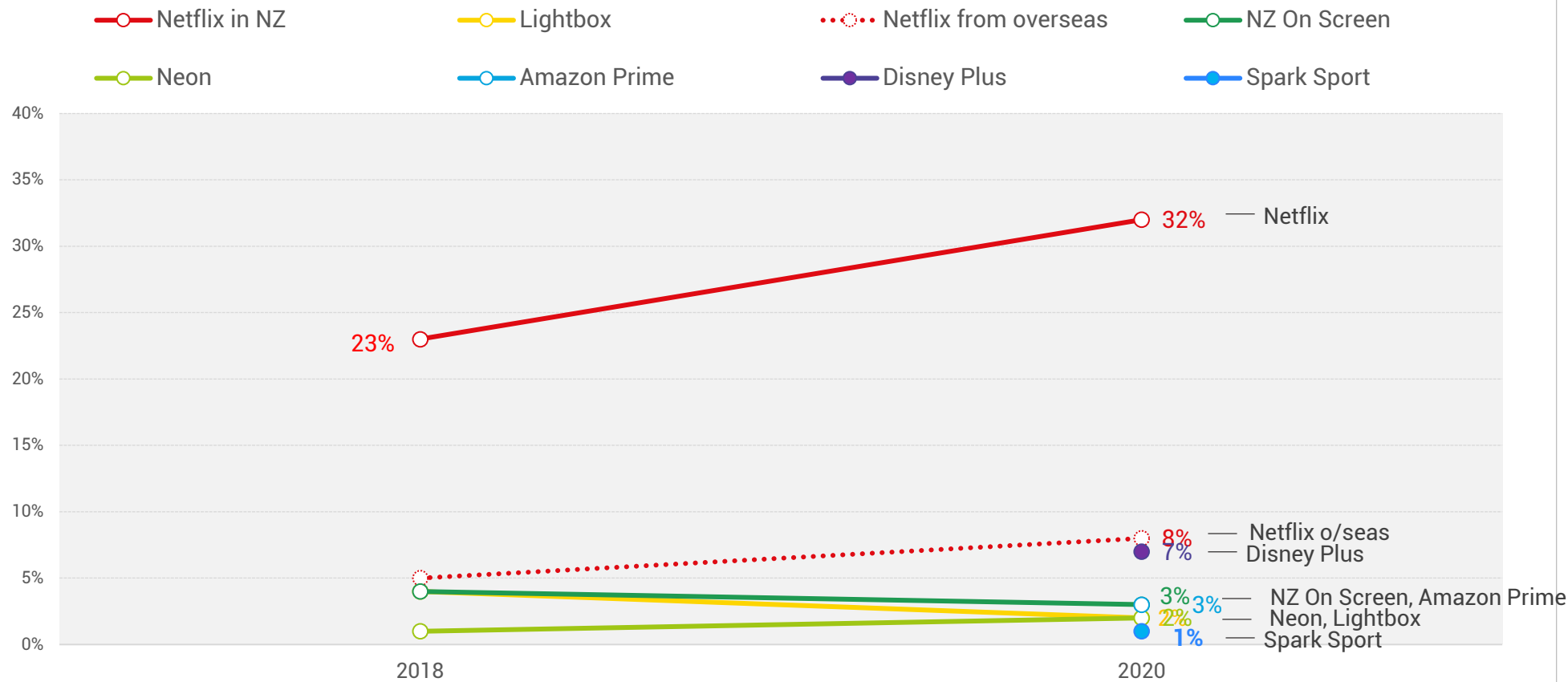
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Netflix is not only the dominant SVOD provider among lower socio, but the only one to show significant growth since 2018. The only exception is the popularity of Disney Plus now reaching 7% of lower socio each day and which wasn't available in 2018.

Daily reach of SVOD sites – all lower socio 15+

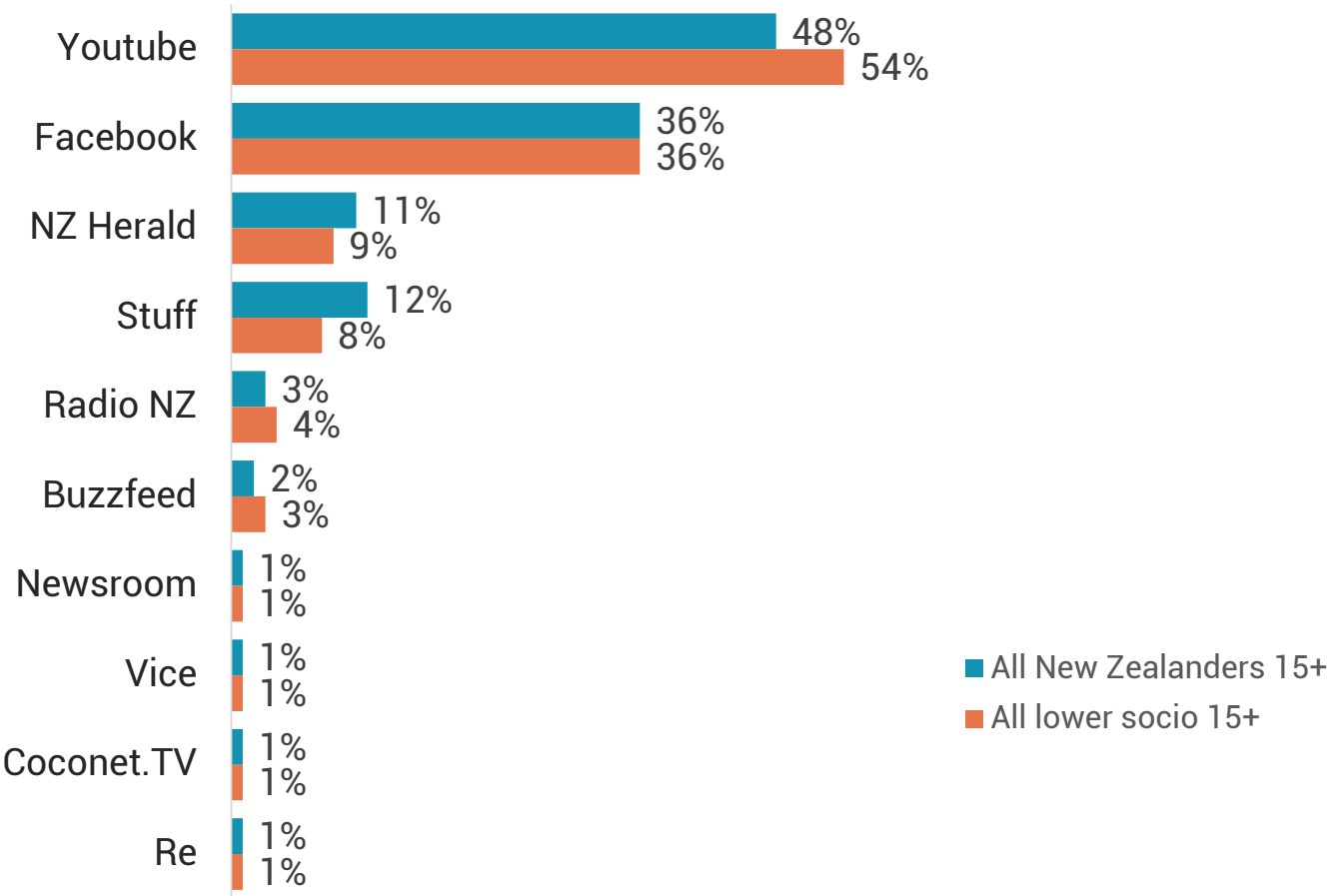
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Lower socio audiences are significantly more likely than all New Zealanders 15+ to use Youtube for video each day. Otherwise the sites this group use each day to watch online video do not differ significantly from overall New Zealanders 15+.

Daily reach of online video sites 2020 – All New Zealanders 15+ & all lower socio 15+.

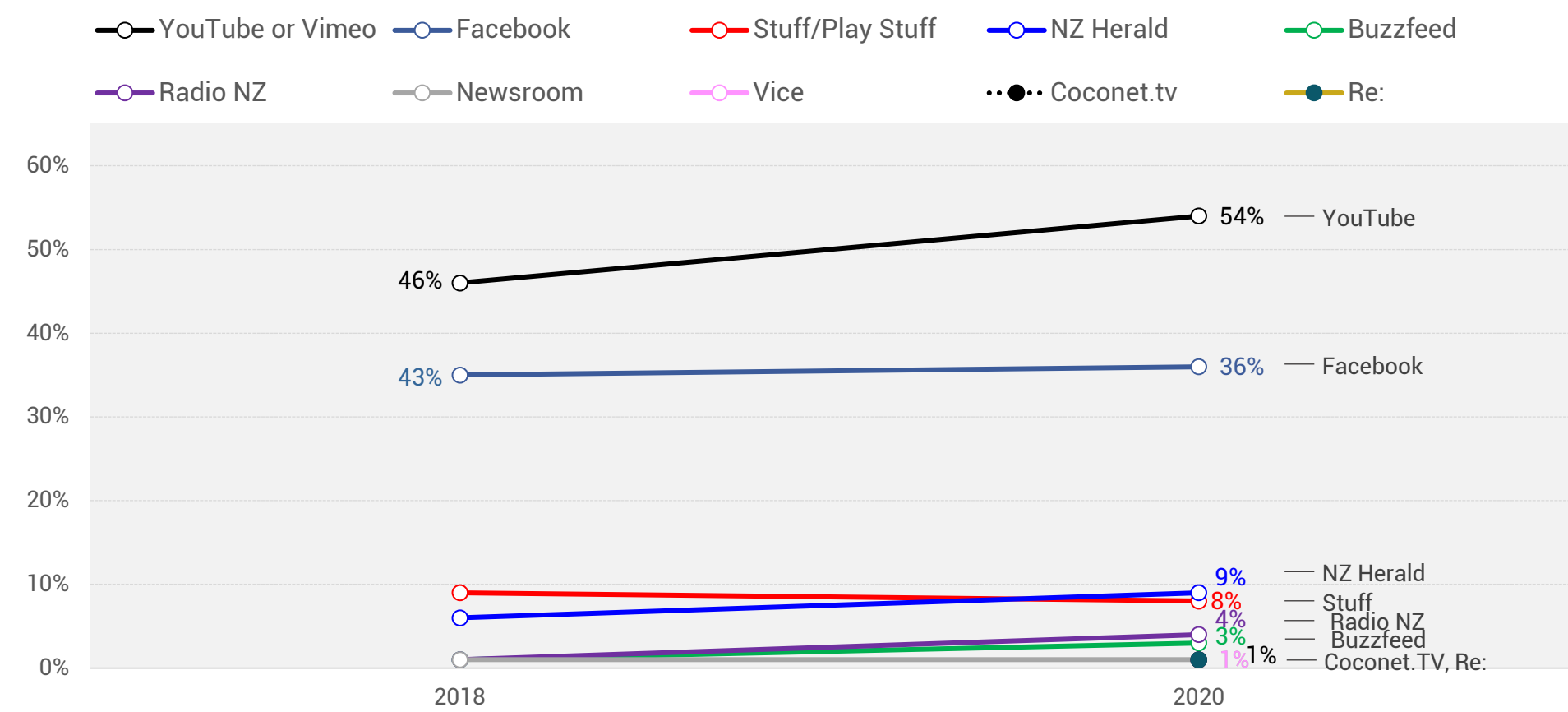
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



YouTube is the only provider to show audience growth since 2018, increasing its lead as the most popular site for online video among lower socio groups.

Daily reach of online video sites – all lower socio 15+.

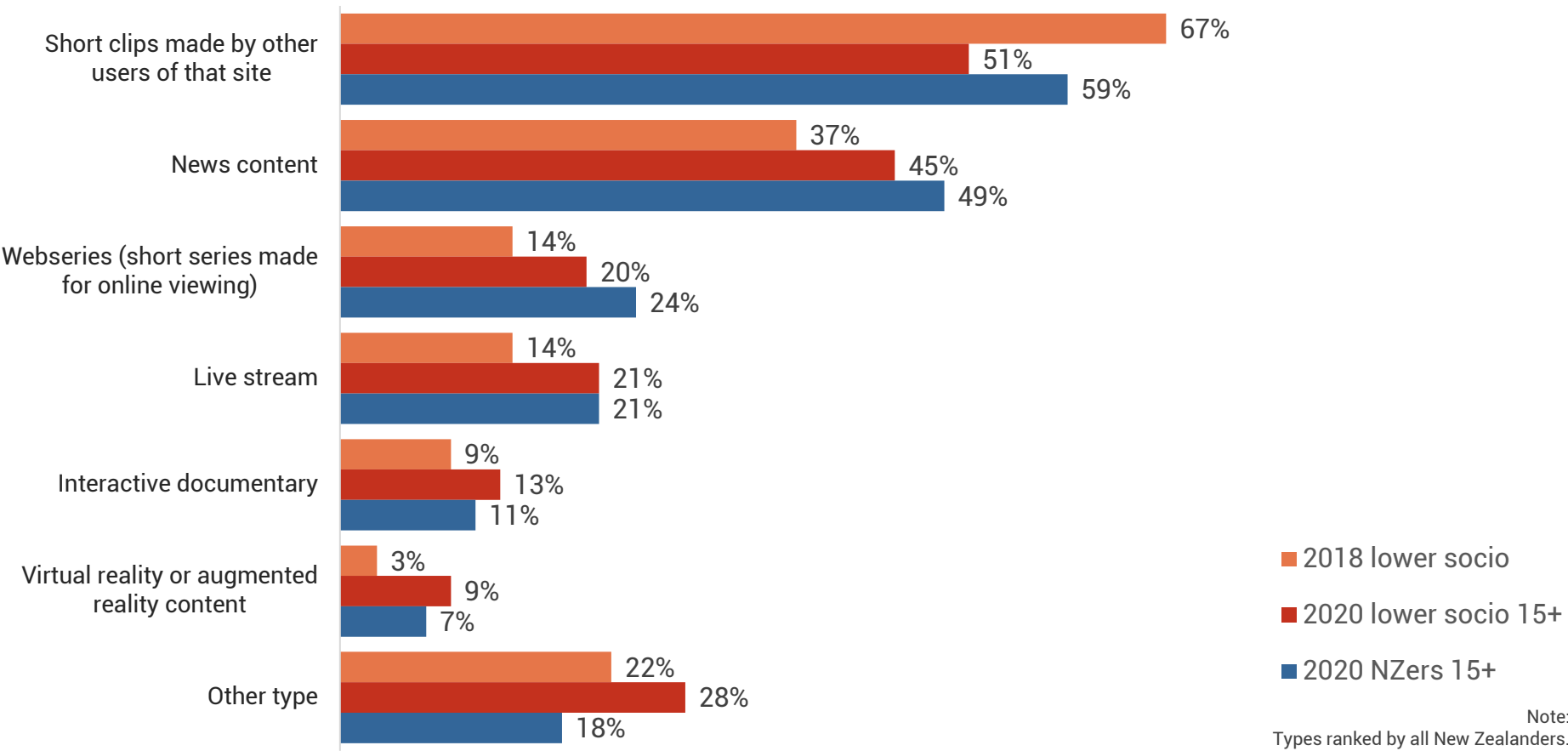
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



While short user generated clips remain the most popular type of online video, the proportion of lower socio groups watching this type has fallen significantly since 2018 and the proportion watching news content has increased.

Types of online video watched – all NZers 15+ and lower socio who watched online video yesterday.

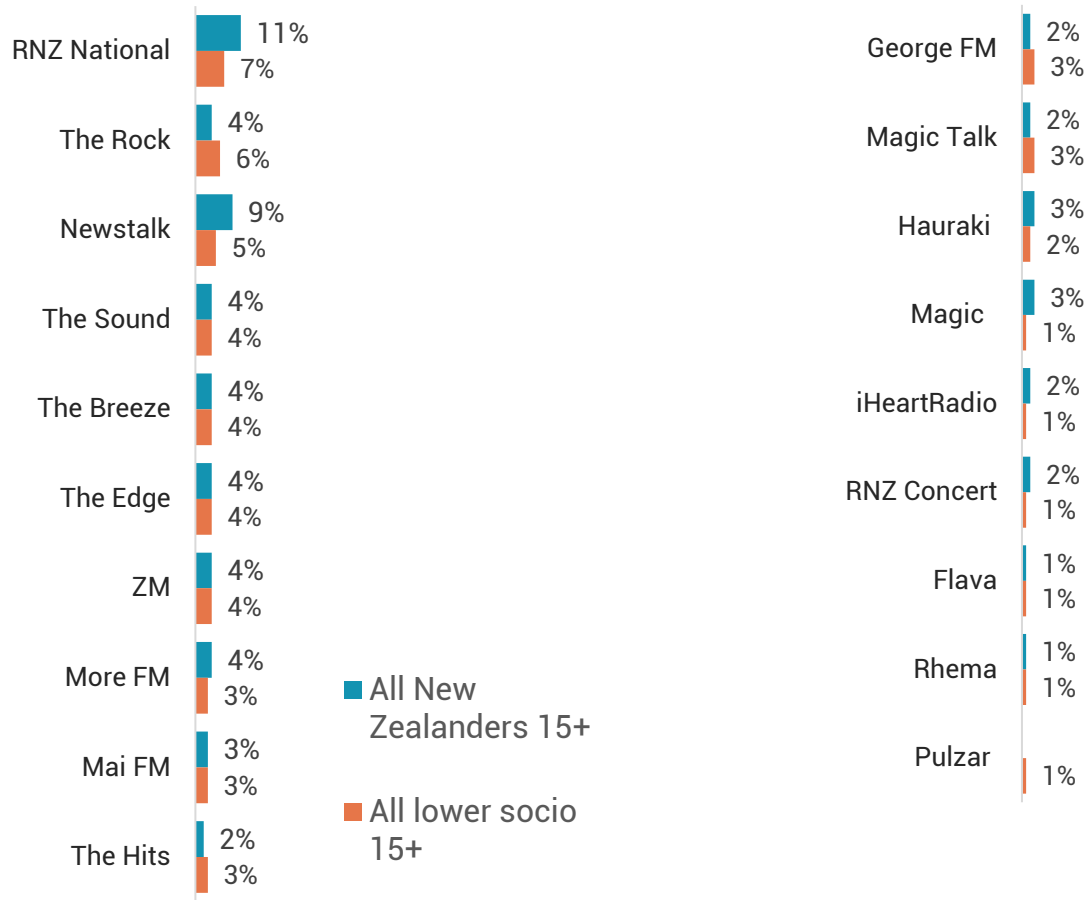
Q: Which of the following types of video did you watch on these sites?



Radio NZ National is the most popular radio station among lower socio-economic groups with 7% of this audience listening each day. The Rock (6%) and then Newstalk (5%) are next most popular.

Daily reach of radio stations 2020 – all New Zealanders 15+ and all lower socio 15+.

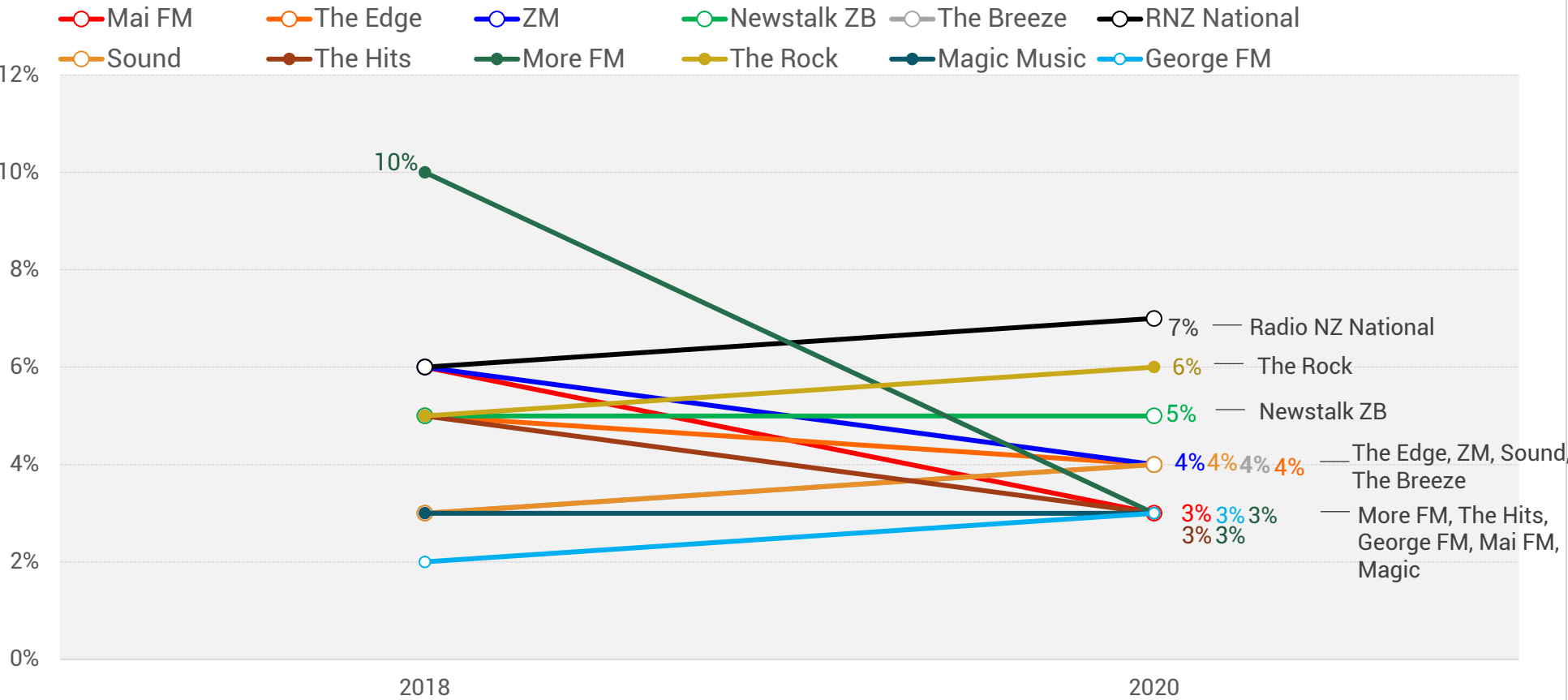
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



Most radio stations show small audience gains or declines since 2018 among lower socio groups, the exception being More FM which has declined to 3% from 10% daily reach in 2018.

Daily reach of radio stations over time (3% reach and above) – all lower socio 15+.

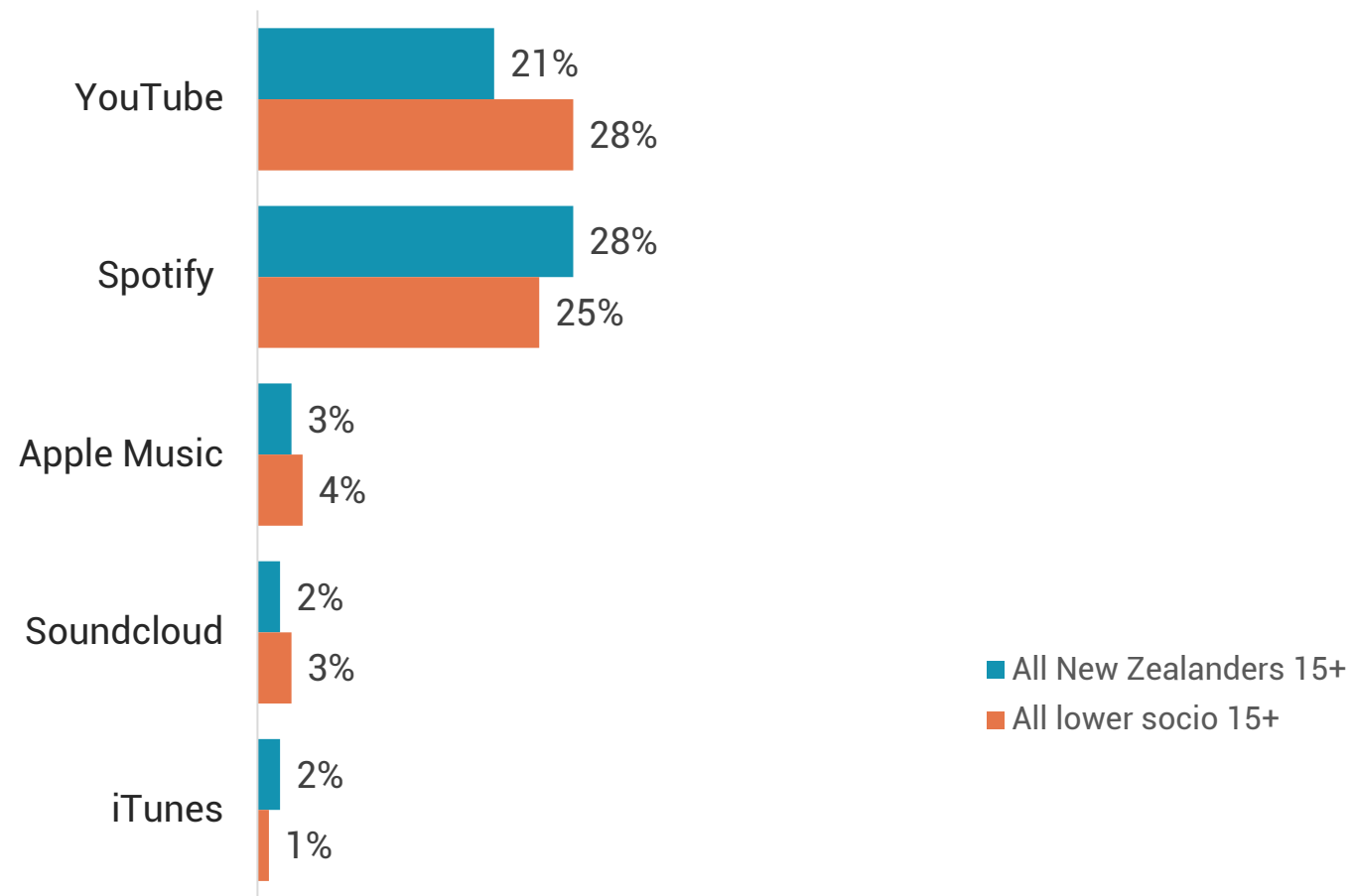
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



Unlike overall New Zealanders 15+, YouTube is more slightly popular than Spotify among lower socio groups for listening to music.

Daily reach of music streaming sites 2020 – All New Zealanders 15+ & all lower socio 15+.

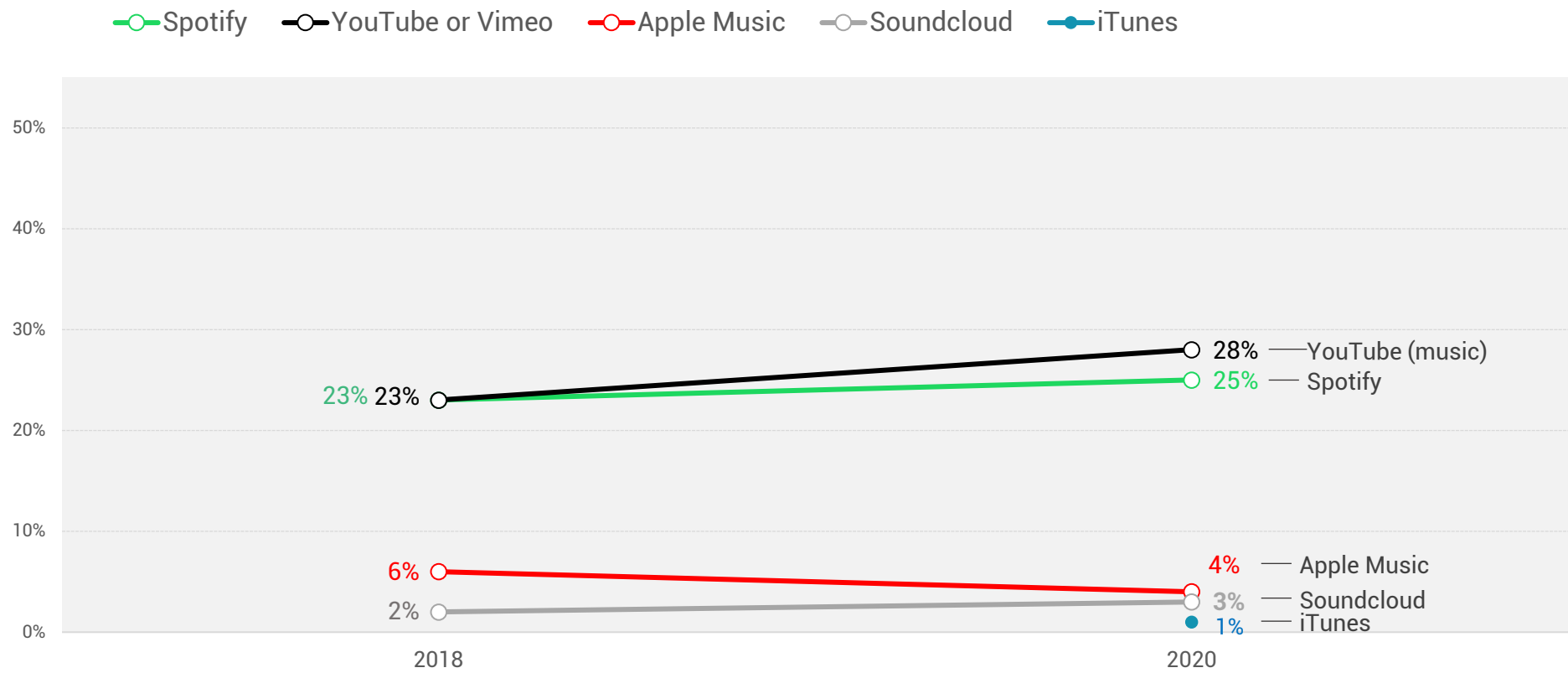
Q: Thinking about yesterday overall, which of the following websites did you use listen to music?



The popularity of YouTube has grown slightly since 2018 and overtaken the daily audience listening to Spotify among this group. Other providers are stable since 2018.

Daily reach of music streaming sites – all lower socio 15+.

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





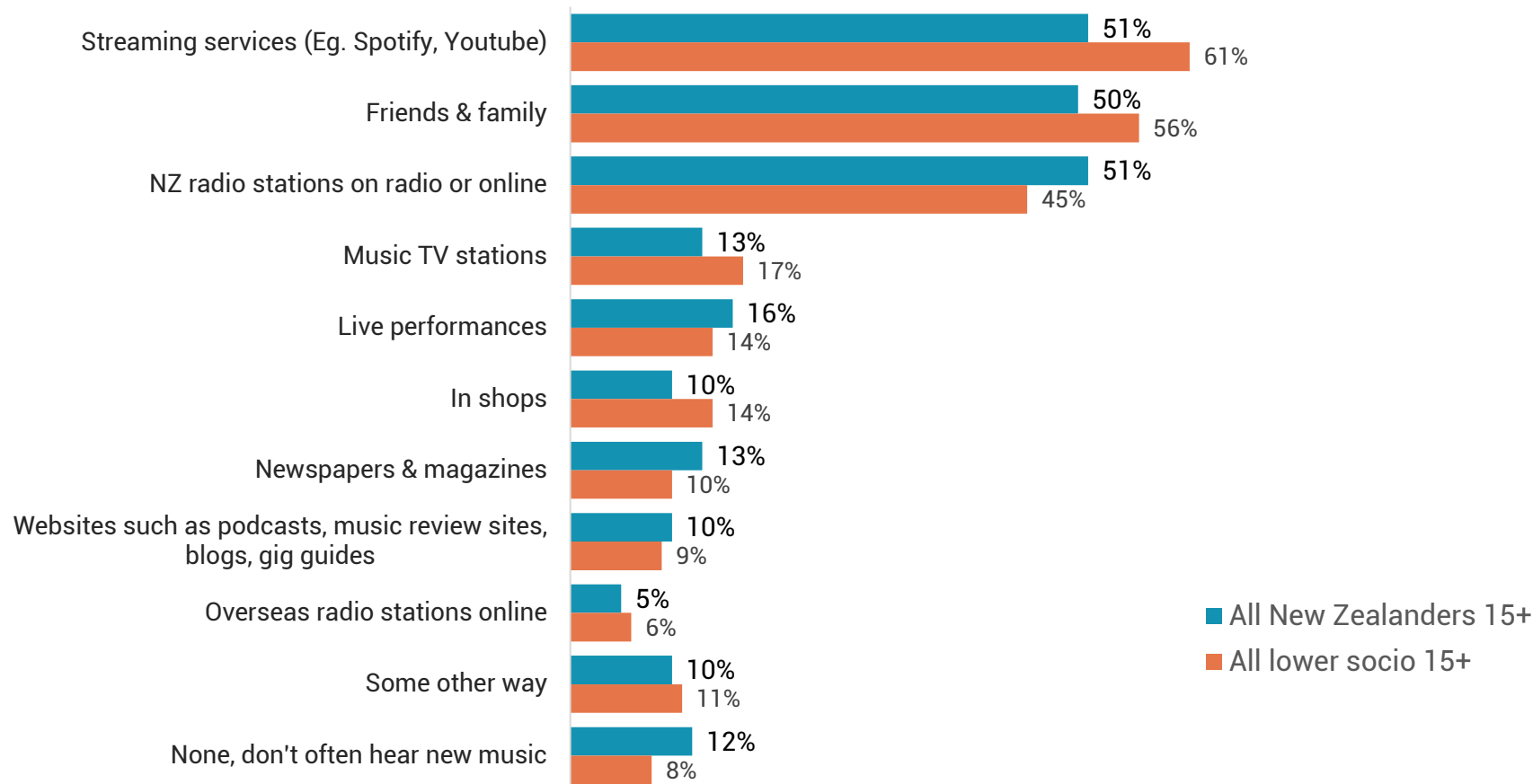
Music Consumption and Behaviour



As per the general population there are three main ways in which lower socio groups discover new music – streaming services, radio stations and friends and family. However lower socio are more likely to use streaming services as a source of new music than overall New Zealanders 15+.

Sources of awareness of new music 2020 – all New Zealanders 15+ & all lower socio 15+.

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

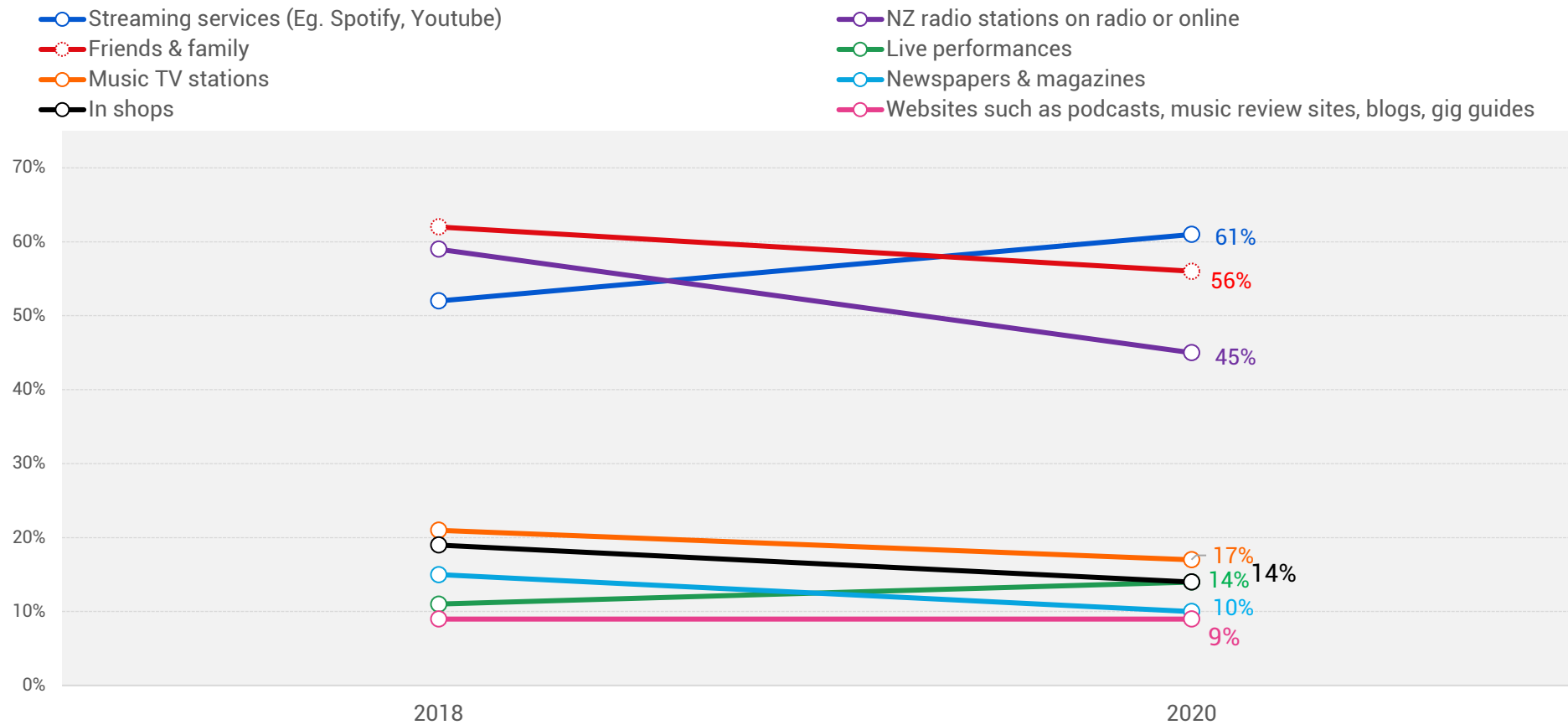


Note:
In 2020 this question was asked of a reduced base size of n=172

Using streaming services as a source of new music has increased since 2018, whereas most other sources, and especially radio stations has declined over the same time.

Sources of awareness of new music over time – all lower socio 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=172.



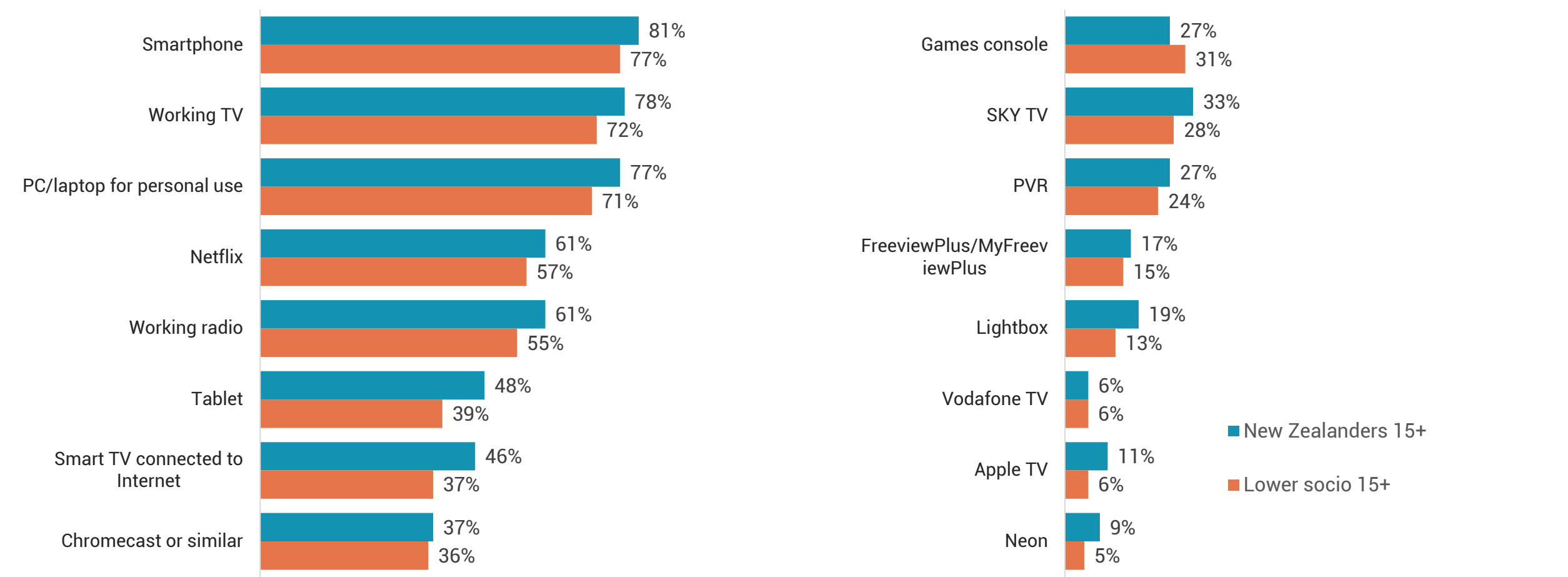
Devices Personally Own Or Have Daily Access To



With the exception of a games console, lower socio groups are consistently less likely to have access to nearly all the devices and platforms that enable media use. These differences are not statistically significant but the difference is consistent.

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

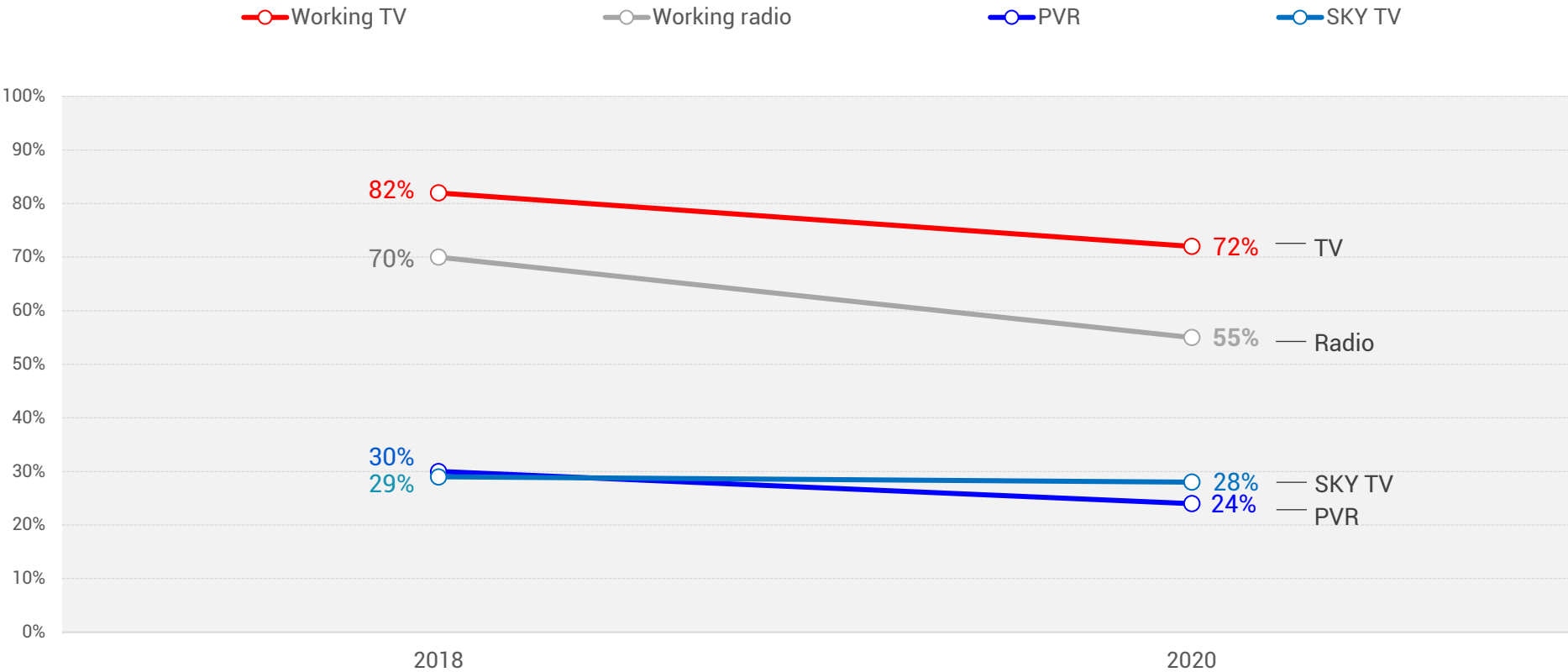
Q: Which of the following, if any, do you personally own or have daily access to?



The incidence of access to SKY TV among lower socio groups has remained stable since 2018 and does not reflect the decline in incidence among overall New Zealanders 15+. Access to other traditional media devices has declined since 2018.

Devices & platforms personally own or have daily access to – all lower socio 15+.

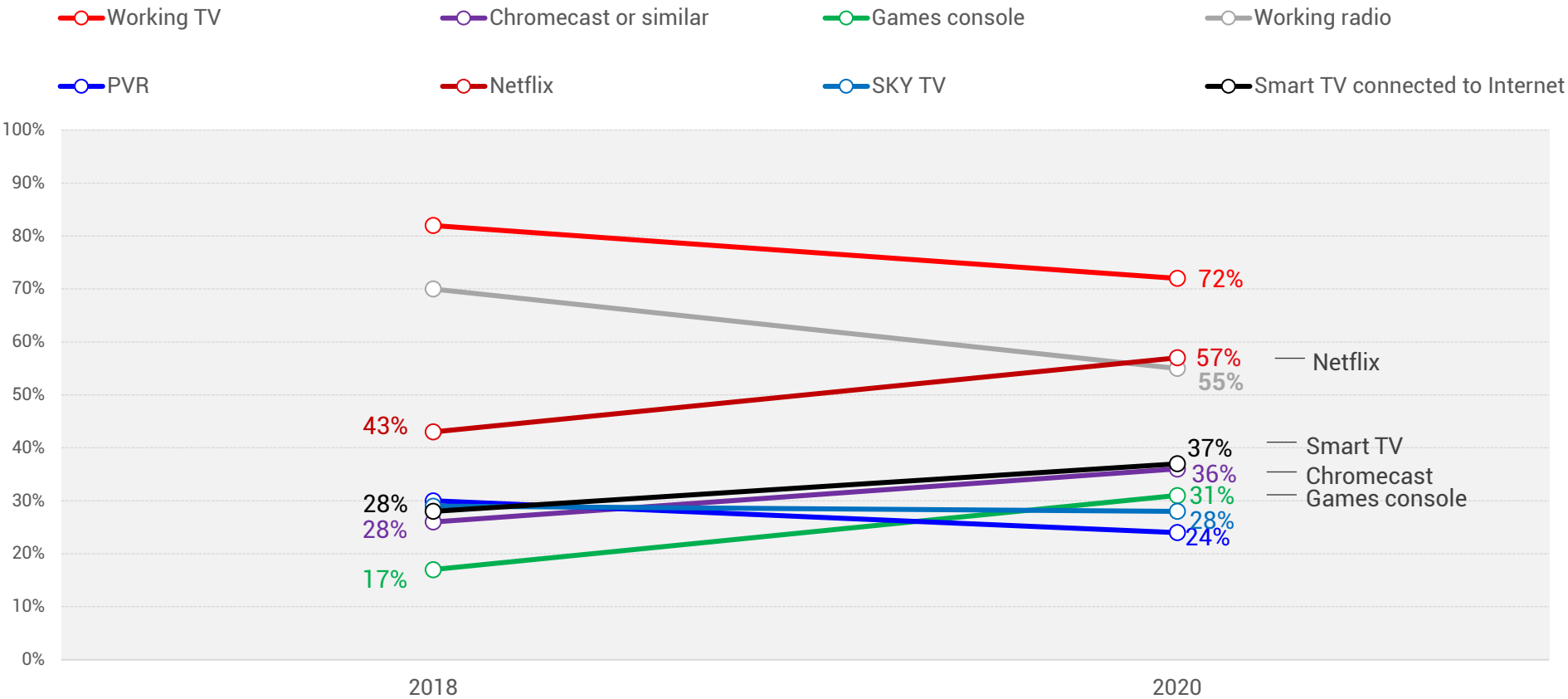
Q: Which of the following, if any, do you personally own or have daily access to?



Conversely Netflix, Chromecast or similar, gaming consoles and smart TVs connected to the Internet have increased in incidence among lower socio groups with Netflix overtaking a radio since 2018.

Devices & platforms personally own or have daily access to – all lower socio 15+.

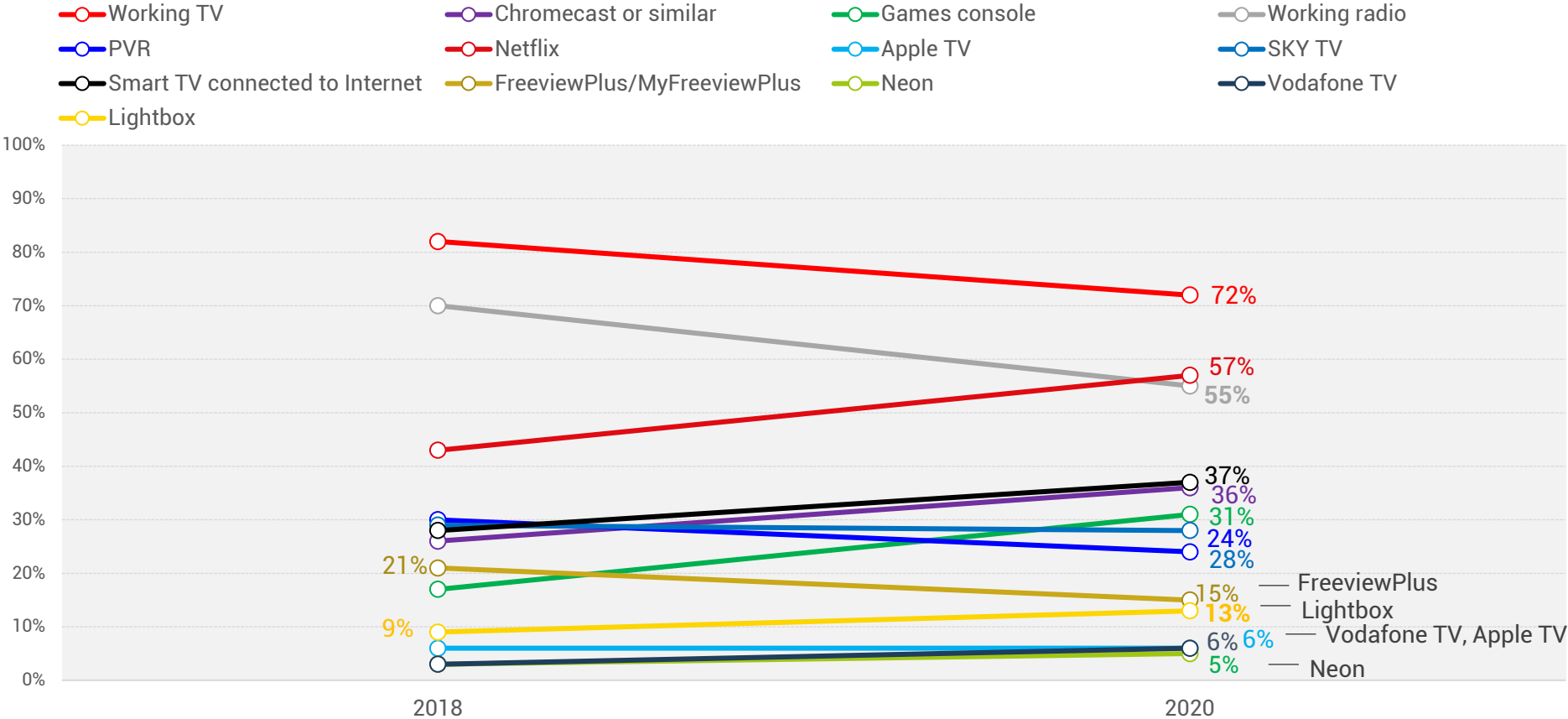
Q: Which of the following, if any, do you personally own or have daily access to?



The incidence of FreeviewPlus/MyFreeviewPlus has fallen since 2018 among lower socio groups, whereas the incidence of Lightbox has grown over the same period. The daily reach of Vodafone TV, Neon and Apple TV is stable.

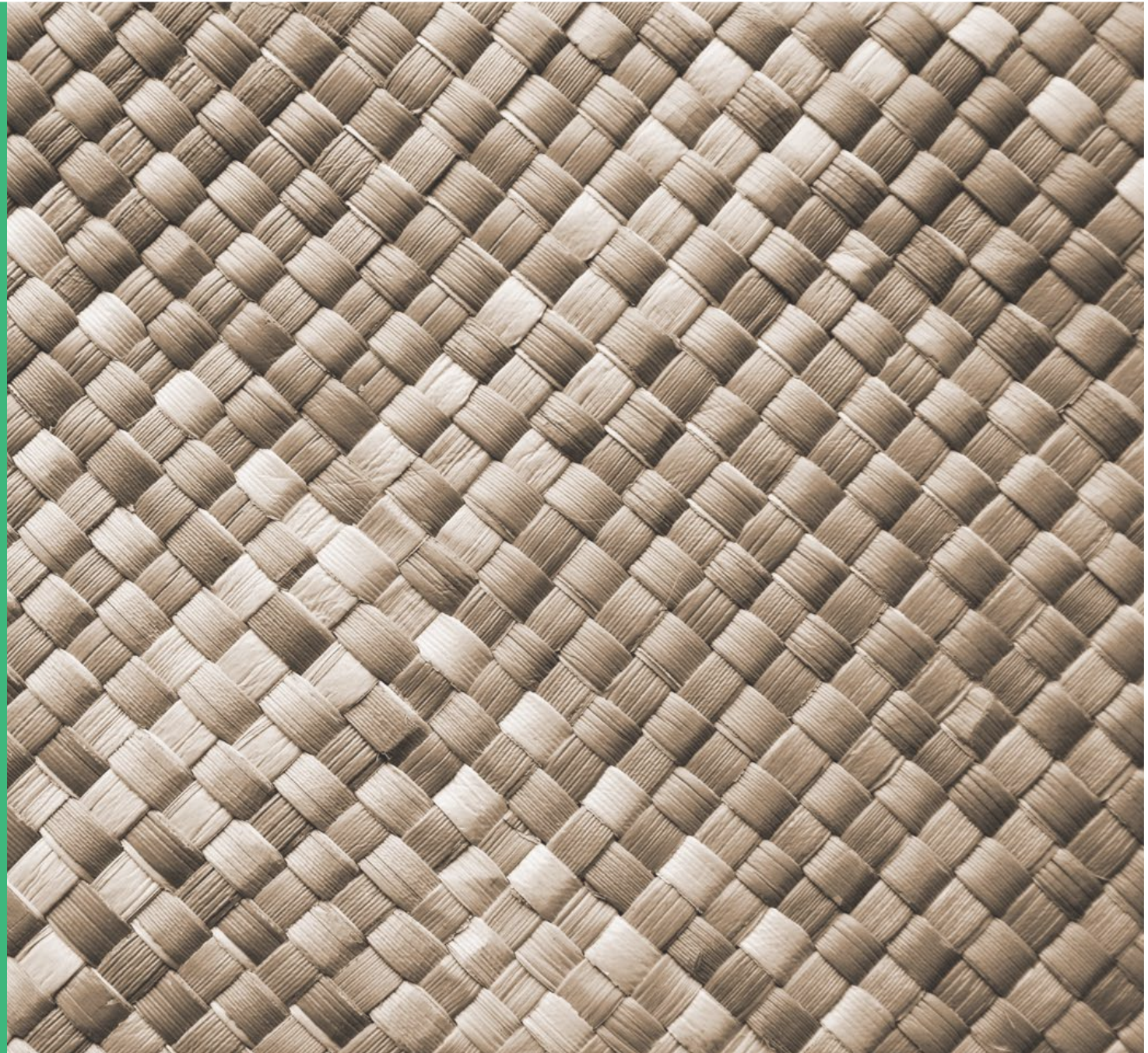
Devices & platforms personally own or have daily access to – all lower socio 15+.

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





Sources of news during Covid-19 lockdown

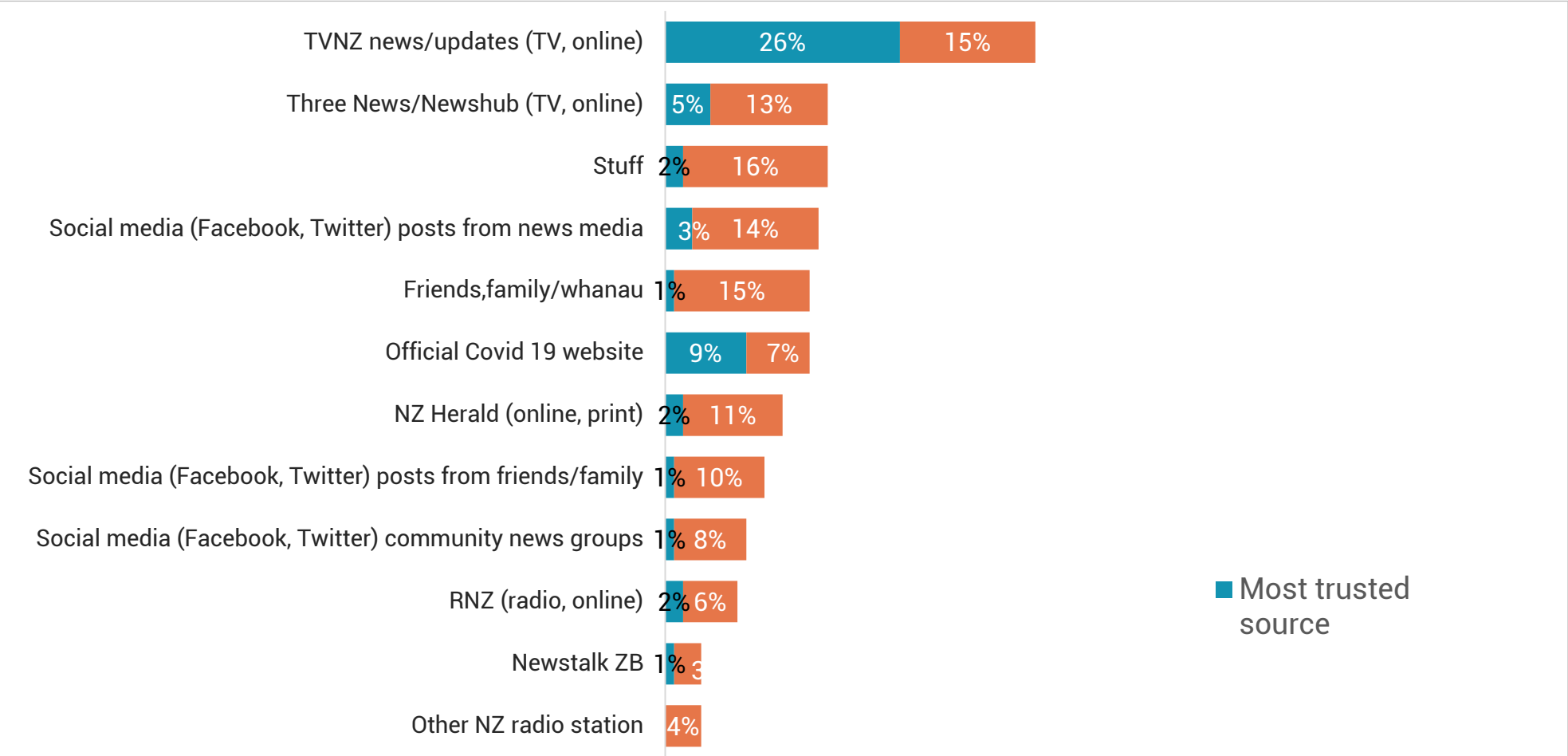


The daily TVNZ 1 Covid-19 updates were New Zealanders from lower socio group's most widely used (41%) and most trusted source of news (26%) by a significant margin. Three News was the second most used source but the Covid-19 website was the second most widely trusted. Social media was widely used, but it was the most trusted source of very few.



Sources of news and information during COVID 19 lockdown (sources used by 4% or more) – all lower socio 15+.

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?



A photograph of a young man and woman sitting on a couch, smiling and holding red mugs. The man is holding a remote control. In the background, a clock is visible on the wall.

WHERE ARE THE **AUDIENCES?** Lower socio-economic report

SEPTEMBER 2020