



WHERE ARE THE **AUDIENCES?**

Māori 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 NZ On Air's 2020 "Where Are The Audiences?" study based on Māori.**
 - It compares the 2014, 2016 and 2018 results among Māori, as well as comparing to the 2020 results among all New Zealanders.

- 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.
- For the NZ On Air main study, a total sample of n=1,511 was developed among all 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. This sample included a sub-sample of N=174 Māori.
- In order to boost the robustness of this report based on Māori alone and enable more detailed and reliable analysis of subgroups within Māori, a separate booster sample of n=347 Māori was commissioned by Te Hiringa Hauora. This sample was developed via online interviewing using the Dynata research panel (formerly Research Now/SSI). This booster sample has been combined with the Māori sub-sample from the main study.
- **This report is therefore based on n = 521 Māori who were included in the main study and booster sample.**
 - This sample has a maximum margin for error of +/-4.3%.
 - The results contained in this report will differ from the NZ On Air report's Māori results as this report merges both samples.

- As in 2014, 2016 and 2018, 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.
- The online interviews for Te Hiringa Hauora booster sample were conducted among all Māori 15+ with and without landlines.
- Interviewing was conducted between May 21 and June 18.
- Respondents were defined as all New Zealanders aged 15 and over.
- The samples from the main study and booster sample have been combined and then post-weighted as per the 2018 Census by age and gender to ensure it is representative of the 15+ Māori population.
 - Note that these age weights are significantly different to the total 15+ population due to the much younger profile of the Māori population compared to the general population.

- The study measured media consumed “yesterday”, for how long, and which channels, stations and sites were used. This approach measured the daily audience behaviour of the main broadcast, print, online and music media.
- 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

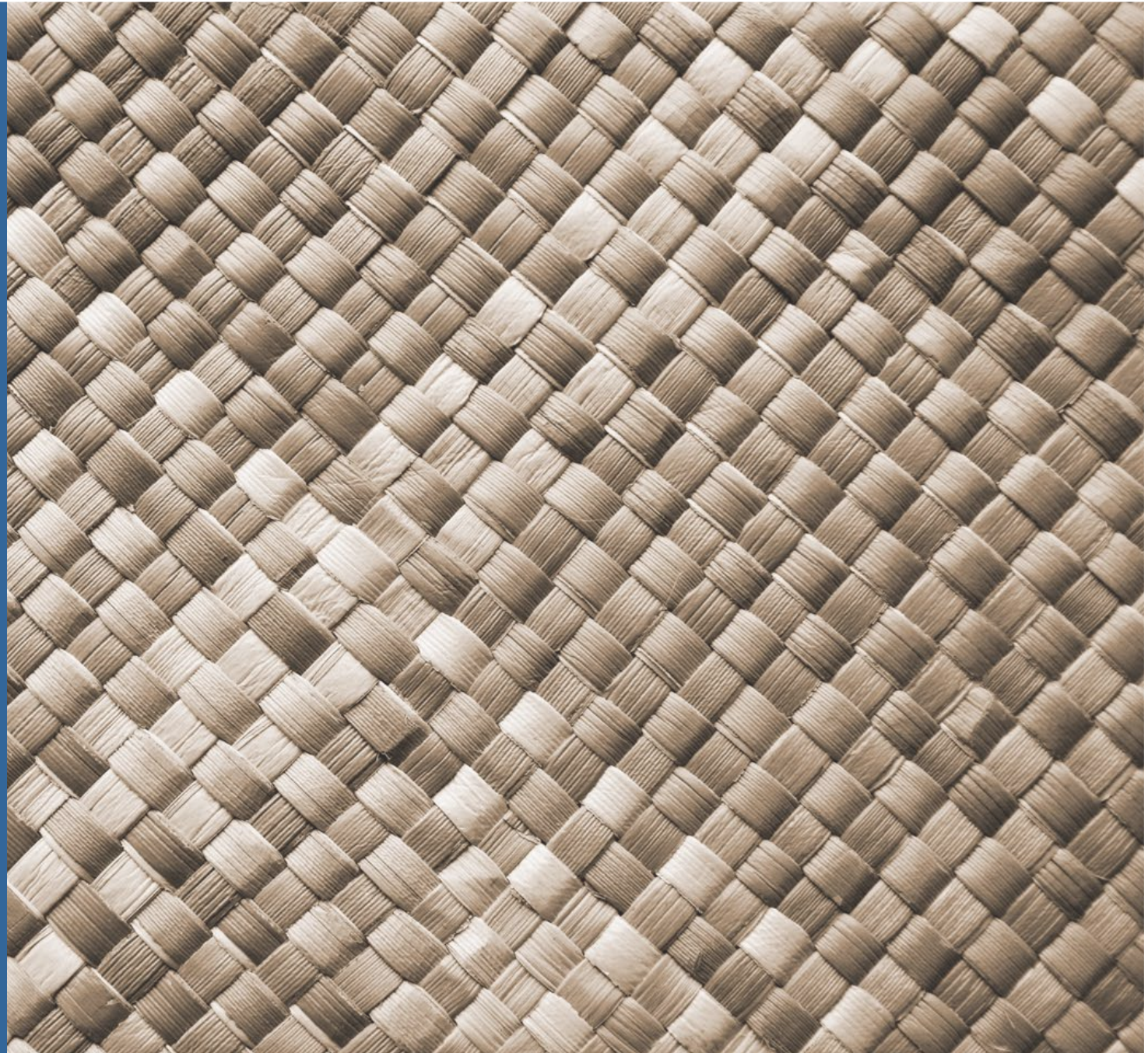
Abbreviations used in charts

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



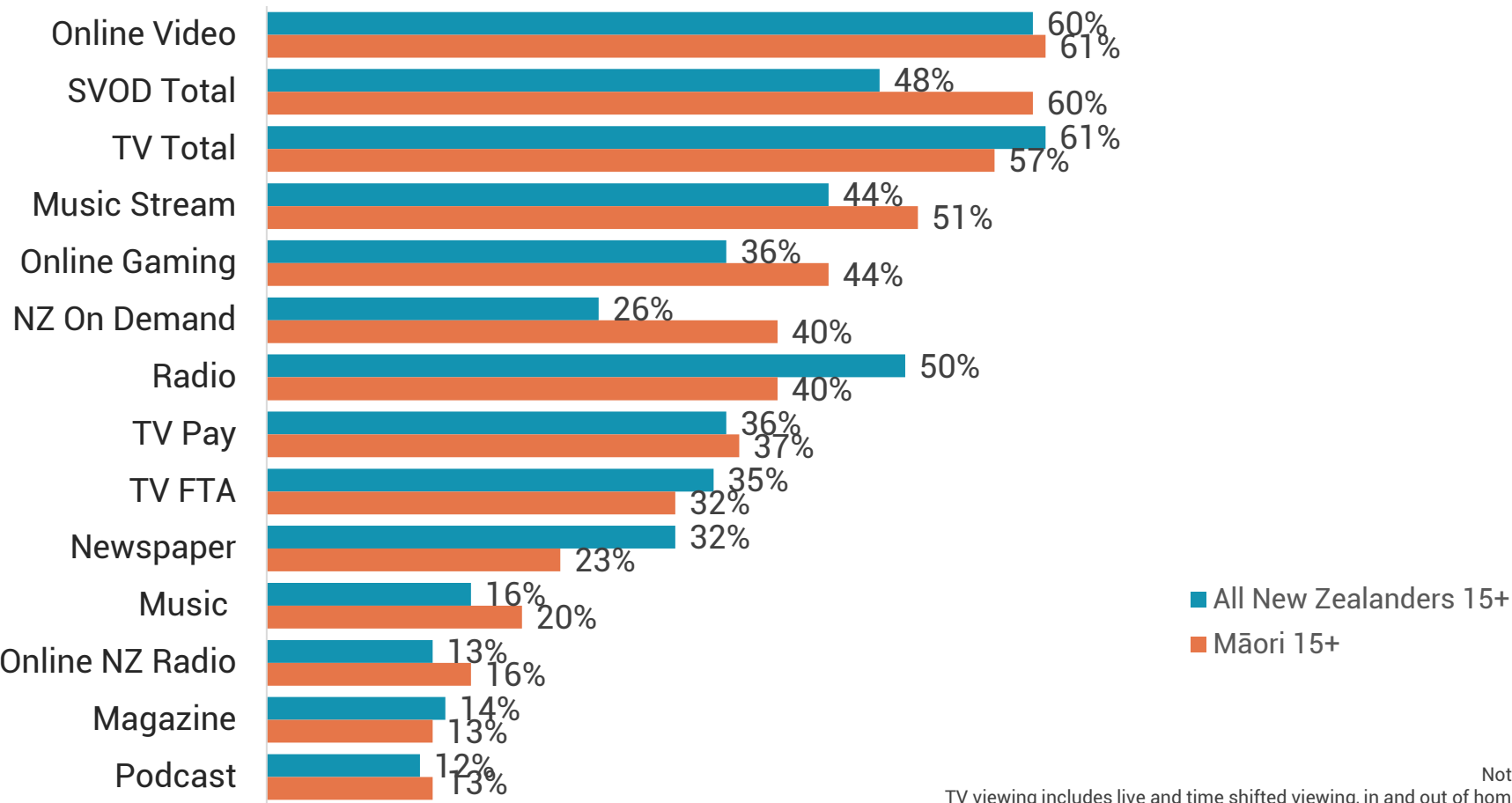
- Overall, Māori are heavier consumers of media than average – in terms of both audience size and longer time spent.
- In particular more Māori use digital media than traditional media compared to all New Zealanders. SVOD and online video now attract the biggest Māori audiences each day, and Māori are more likely than average to watch SVOD, listen to streamed music and watch on demand.
- In addition, while TV remains the media that New Zealanders overall dedicate the most time to, Māori now spend more time watching SVOD each day than TV.
- Use of digital media is even more widespread among younger Māori.
- The most popular media providers among Māori are now the international digital providers Youtube, Netflix and Facebook, with Spotify only narrowly behind TVNZ 1.
- Despite the higher overall use of digital media, in 2020 Māori are at the cross-over point between digital and traditional media attracting the biggest audience each day.
- Traditional media has continued to decline since 2020 while digital media has grown, however there are signs that the growth rate of digital media has slowed. This slowing may be related to fewer Māori having access to some devices and services that enable access to digital media – particularly a smartphone, PC/laptop, smart TV connected to Internet and tablet.

Daily reach 2020. There is similarity in the media consumption of Māori and all New Zealanders 15+, however Māori more likely to watch SVOD, listen to streamed music, do online gaming and watch on demand and less likely to listen to the radio or read a newspaper.



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



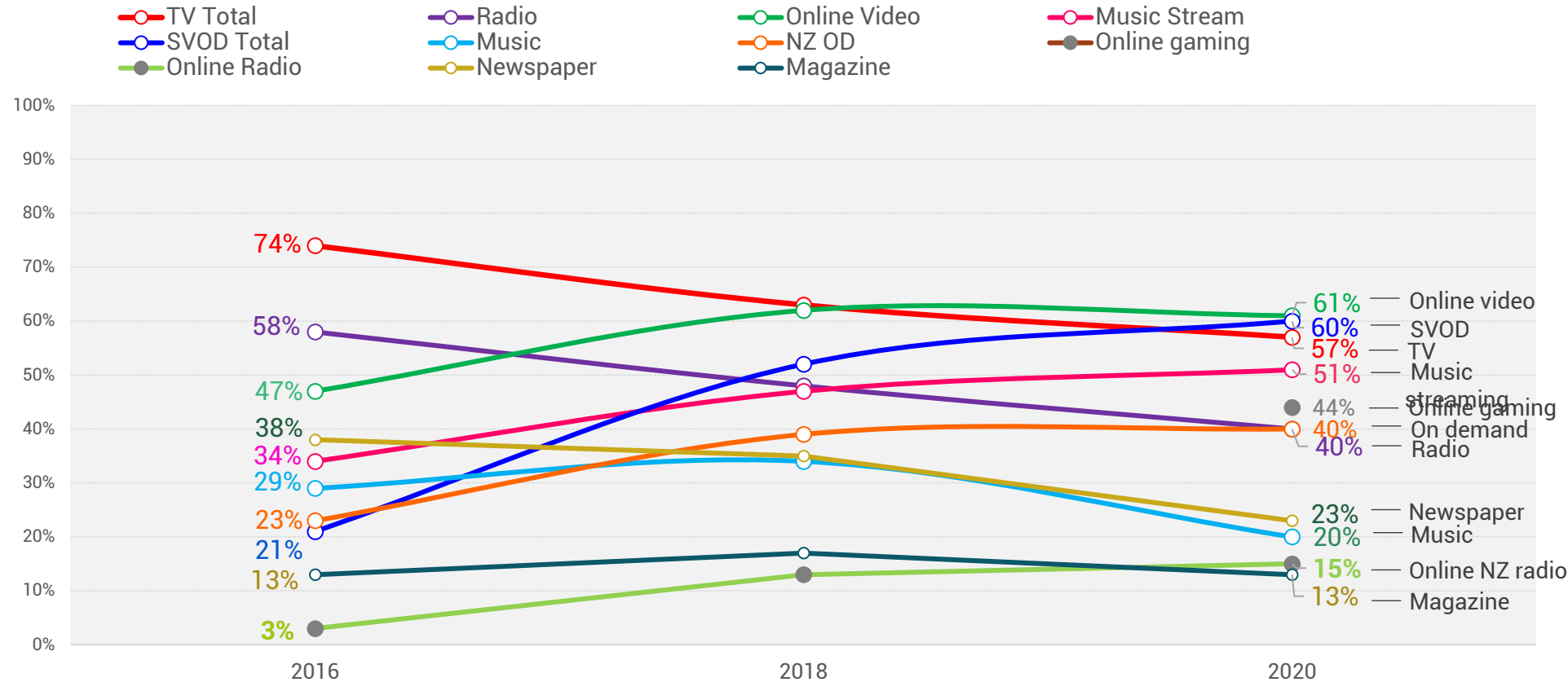
- ▶ Online video and SVOD are now the most popular media, each attracting six in ten Māori each day.
- ▶ TV delivers the next biggest audience.
- ▶ Streamed music, online gaming, and on demand are next most popular, each attracting a significantly bigger audience among Māori than among all New Zealanders.

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

Daily reach over time. With the exception of music (physical formats) and newspapers, audiences have grown or declined only slightly since 2018, however this level of change has been sufficient for online video and SVOD to overtake TV as the most popular media among Māori, and for music streaming to overtake radio.

Daily reach of media over time – All Māori 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 rate of decline of TV and radio has been relatively consistent since 2018, but accelerated for newspapers and music on physical formats.
- ▶ However the growth rate of most digital media may have slowed since 2018.
- ▶ This means that Māori audiences are at the cross-over point in 2020 in terms of digital and traditional media attracting the biggest audiences each day.

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=451; 2020 n=521).

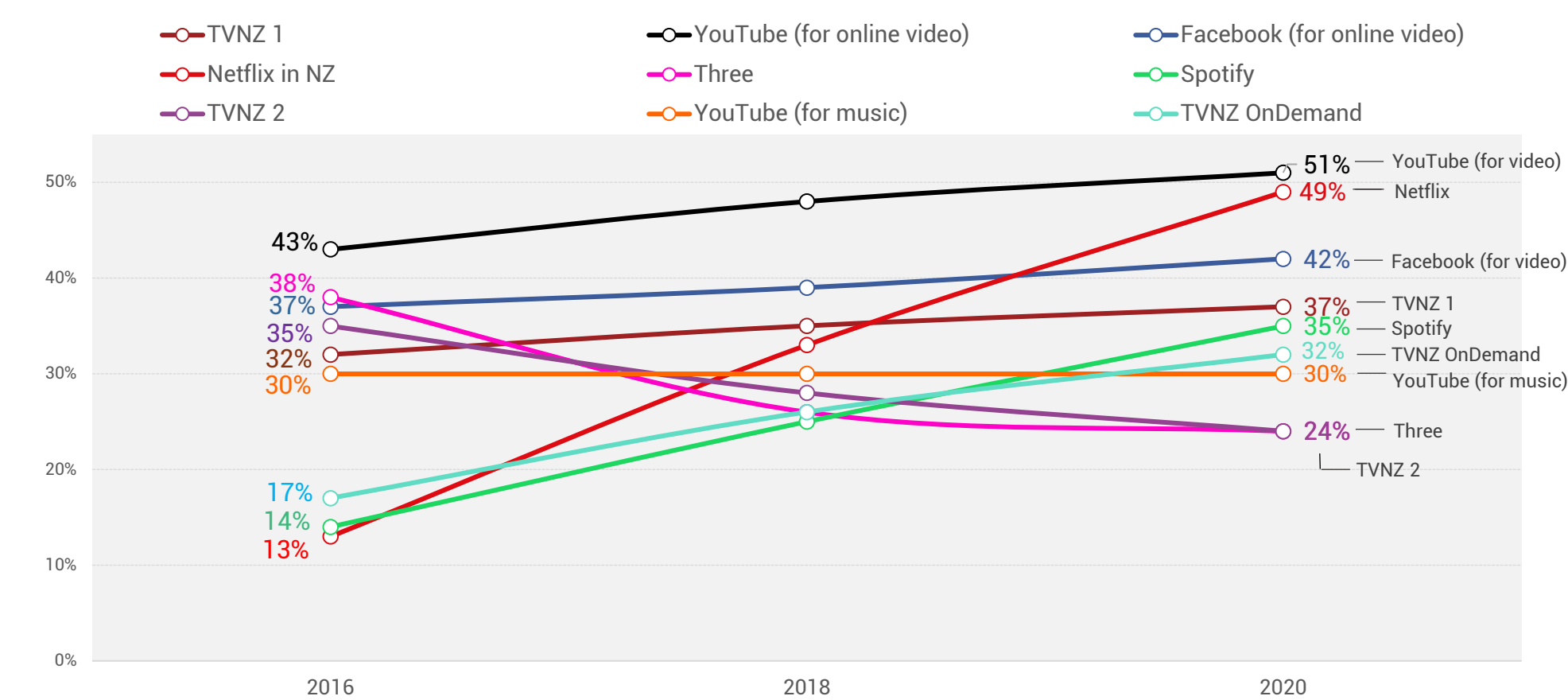
- Māori tend to be more likely to use most media than overall New Zealanders. In particular they are significantly more likely to use SVOD, streamed music, online gaming, and on demand.
 - While the Māori audience using traditional media is declining, it is doing so more slowly than among overall New Zealanders.
 - As a result this audience is relatively evenly split, and therefore fragmented between traditional and digital media.
- In addition this audience tend to consume nearly all media for significantly longer than overall New Zealanders, and especially SVOD (which continues to increase dramatically), online video, online gaming, streamed music and on demand.
- As a result they are also significantly more likely to use the market leaders in digital media, especially TVNZ OnDemand, Netflix, Spotify and YouTube.
- Broadcast radio is the exception, attracting a smaller than average audience among Māori and for less time than average. However Mai FM and The Edge, despite significant declines since 2018, still attract nearly one in ten Māori each day.
- TV audiences continue to decline slowly among Māori but this audience are more likely to watch TVNZ 2 and Māori TV than overall New Zealanders.
- In contradiction to this audience's high media use, Māori are less likely to have access to some devices and platforms including a smartphone, working TV, PC/laptop, radio, smart TV connected to Internet, tablet, and PVR.
 - They are more likely to have access to a gaming console.

Most popular channels, sites and stations 2020. YouTube remains the most popular site, channel or station but Netflix has continued to grow rapidly in popularity among Māori, over-taking TVNZ 1 and Facebook since 2018. Spotify and TVNZ OnDemand have also continued to grow significantly in audience size since 2018, while other channels, sites and stations are more stable.



Most popular channels, sites & stations – all Māori 15+

Q: Which of the following did you use yesterday?



- Next six:
- Disney Plus 15%
 - Māori TV 11%
 - Stuff (video) 11%
 - Mai FM 9%
 - Prime 9%
 - NZ Herald 9%

- The generation gap that influences media consumption overall is also a strong influence on the behaviour of Māori audiences. Māori are a younger cohort resulting in an overall tendency to consume digital media in greater numbers than traditional media.
- The generation gap appears at slightly different ages across different media but typically manifests itself among Māori between the ages of 40 and 49. Below 40 digital media dominates Māori media consumption, while above 50 years old traditional media is still most popular.
- There is also a socio-economic influence on media behaviour among Māori. Upper white collar workers are more likely to consume nearly all digital and traditional media, and higher income earners are also more likely to consume some media. Higher socio-economic levels may have greater access to devices and platforms that enable consumption of some media.



Daily Media Consumption

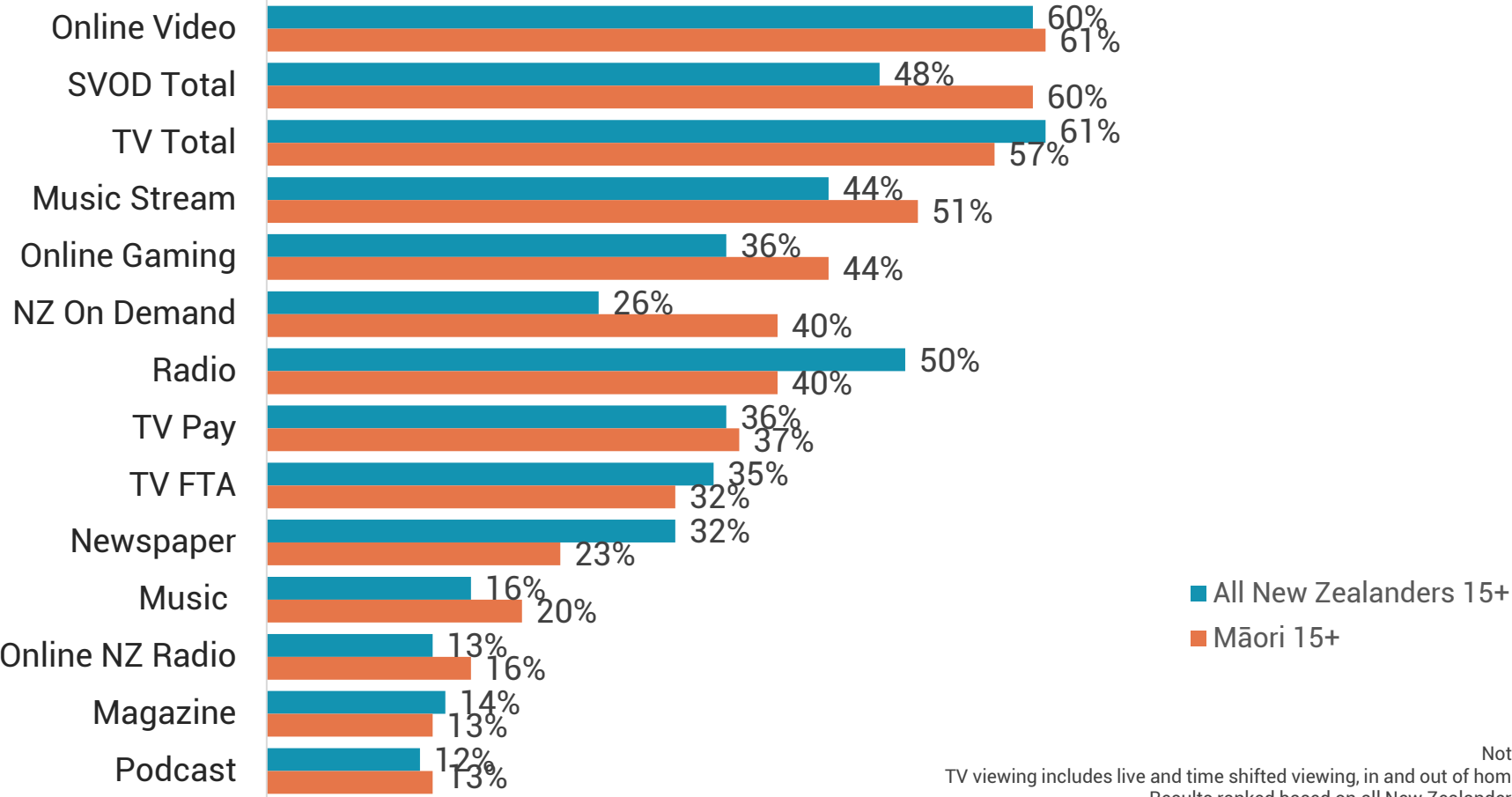


There is similarity in the media consumption of Māori and all New Zealanders 15+, however Māori more likely to watch SVOD, listen to streamed music, do online gaming and watch on demand and less likely to listen to the radio or read a newspaper.



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



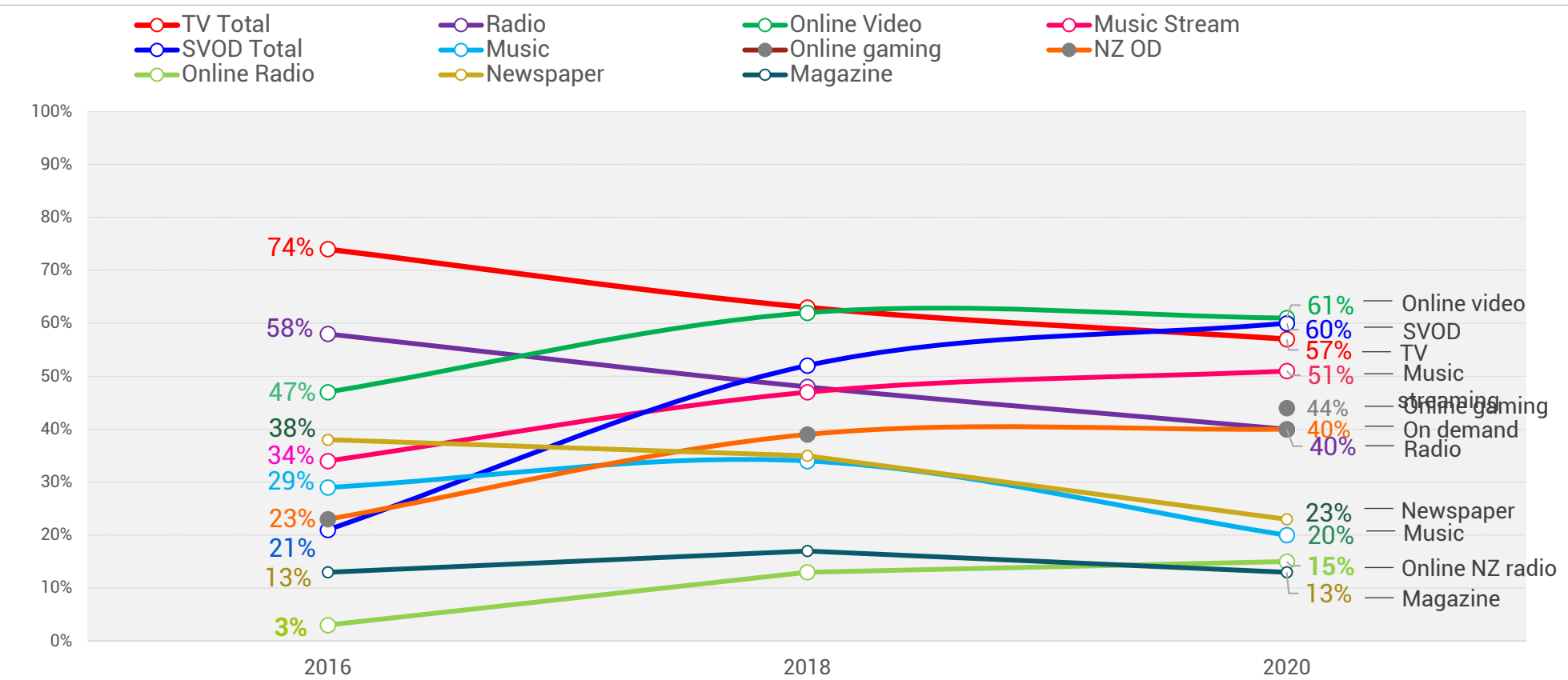
- ▶ Online video and SVOD are now the most popular media, each attracting six in ten Māori each day.
- ▶ TV delivers the next biggest audience.
- ▶ Streamed music, online gaming, and on demand are next most popular, each attracting a significantly bigger audience among Māori than among all New Zealanders.

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

With the exception of music (physical formats) and newspapers, audiences have grown or declined only slightly since 2018, however this level of change has been sufficient for online video and SVOD to overtake TV as the most popular media among Māori, and for music streaming to overtake radio.

Daily reach of media over time – All Māori 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



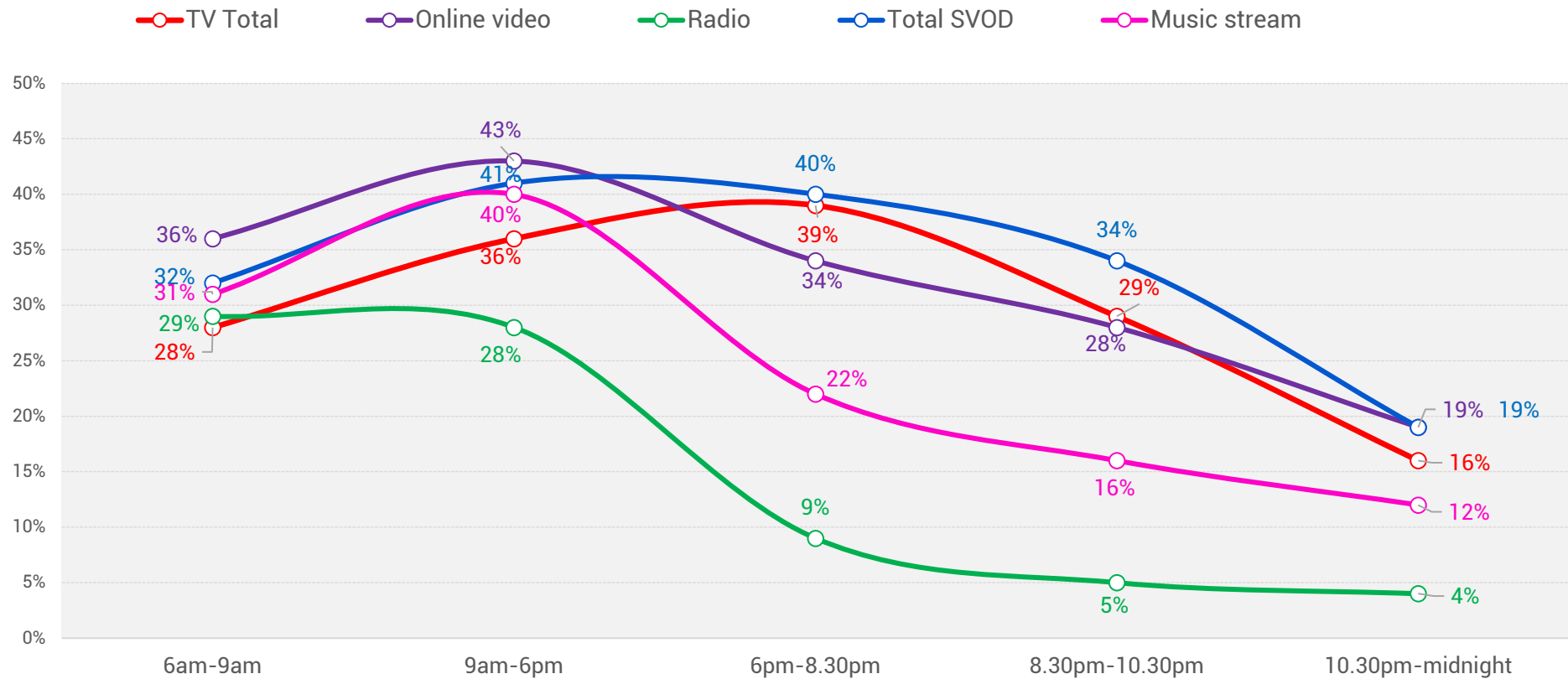
- ▶ The rate of decline of TV and radio has been relatively consistent since 2018, but accelerated for newspapers and music on physical formats.
- ▶ However the growth rate of most digital media may have slowed since 2018.
- ▶ This means that Māori audiences are at the cross-over point in 2020 in terms of digital and traditional media attracting the biggest audiences each day.

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

The way Māori consume media changes over the day. Online video is most popular during the day – narrowly over SVOD and music streaming. SVOD is then most popular during the traditional TV peak period, with TV attracting the second biggest audience at that time.

Reach of media over the day 2020 – all Māori 15+

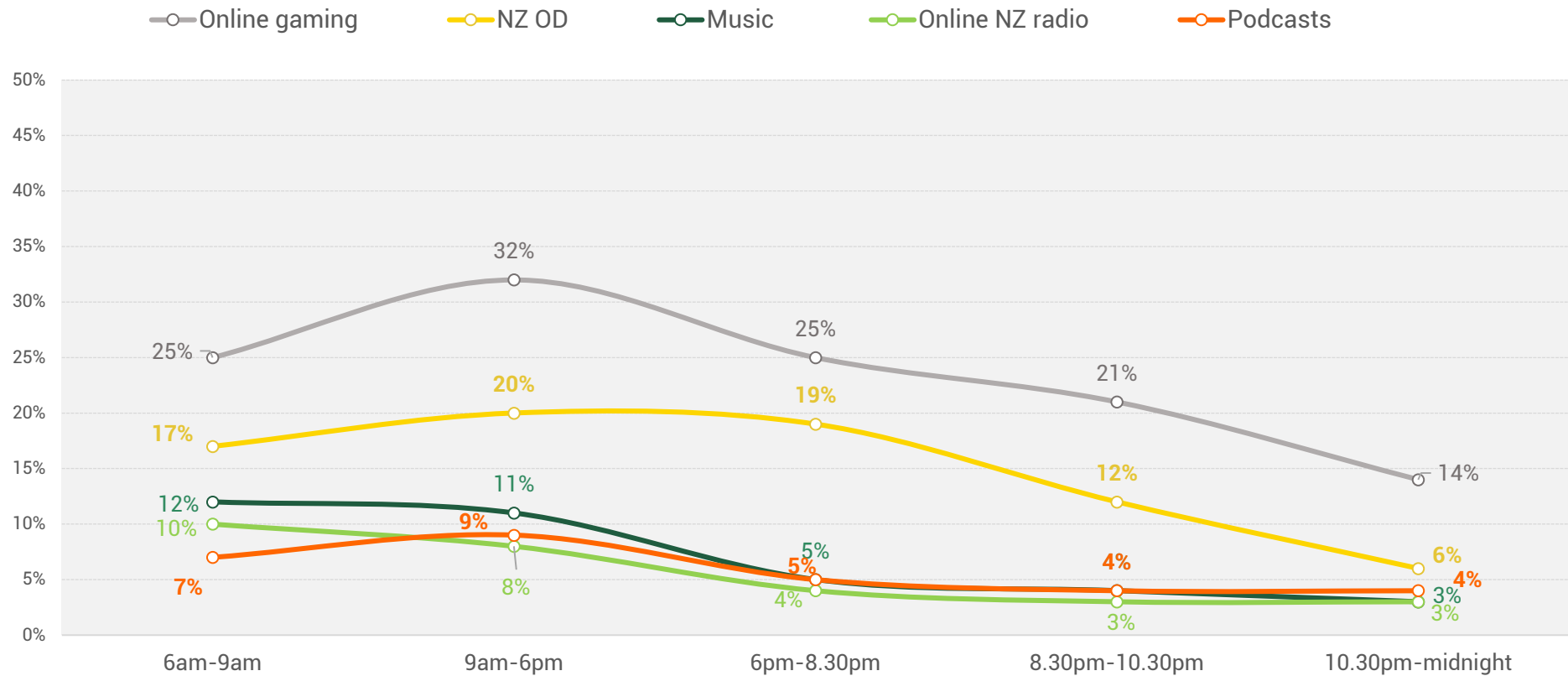
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Online gaming attracts similar sized audiences as radio and TV among Māori during the day and maintains that audience during traditional TV peak. On demand also has a relatively steady audience until later in the evening.

Reach of media over the day 2020 – all Māori 15+

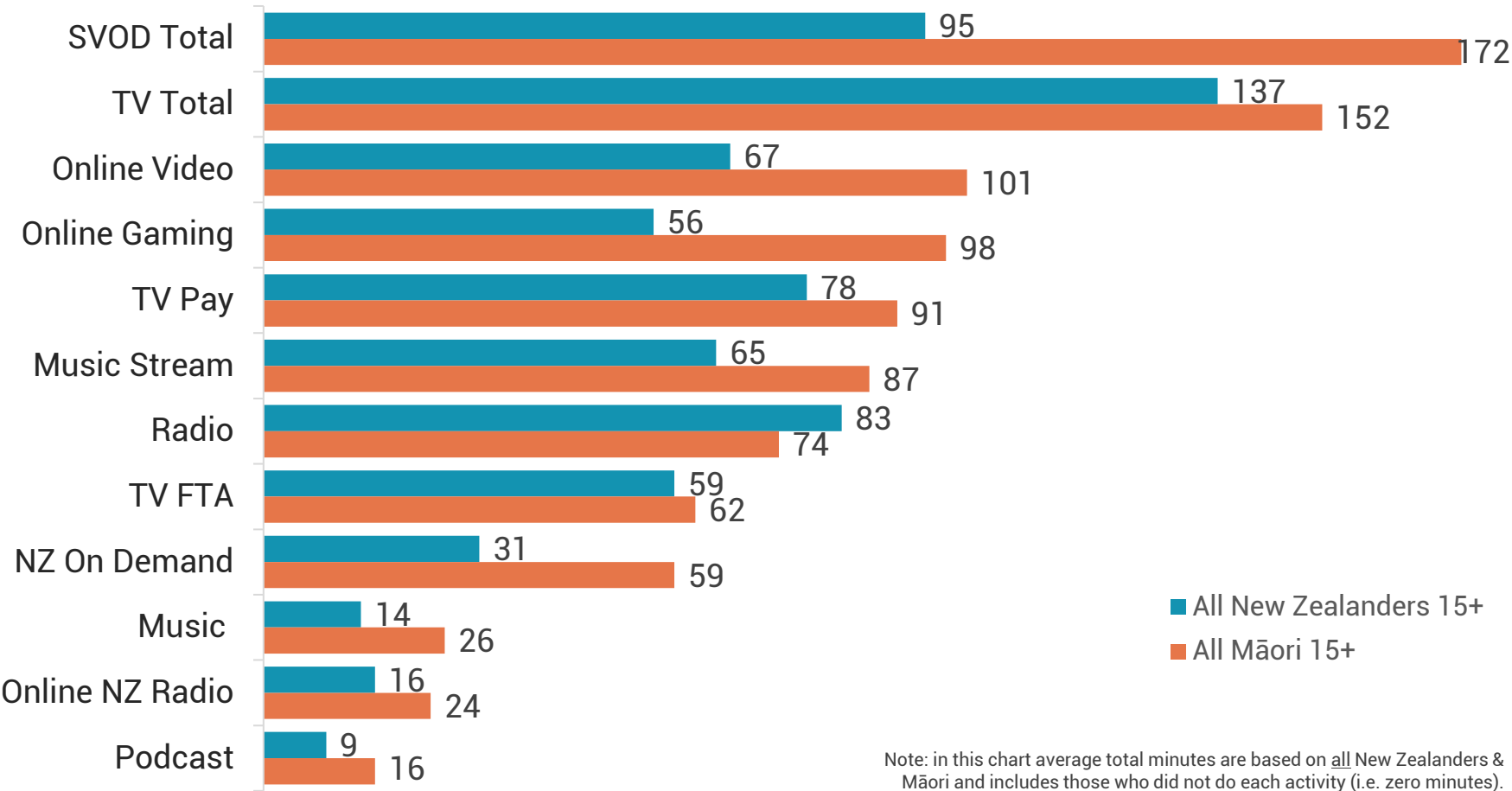
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Māori spend more time using almost all media than New Zealanders 15+, with the difference most apparent for online video and gaming. SVOD (almost 3 hours per day) and TV (2½ hours per day) receive the most time overall.

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

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

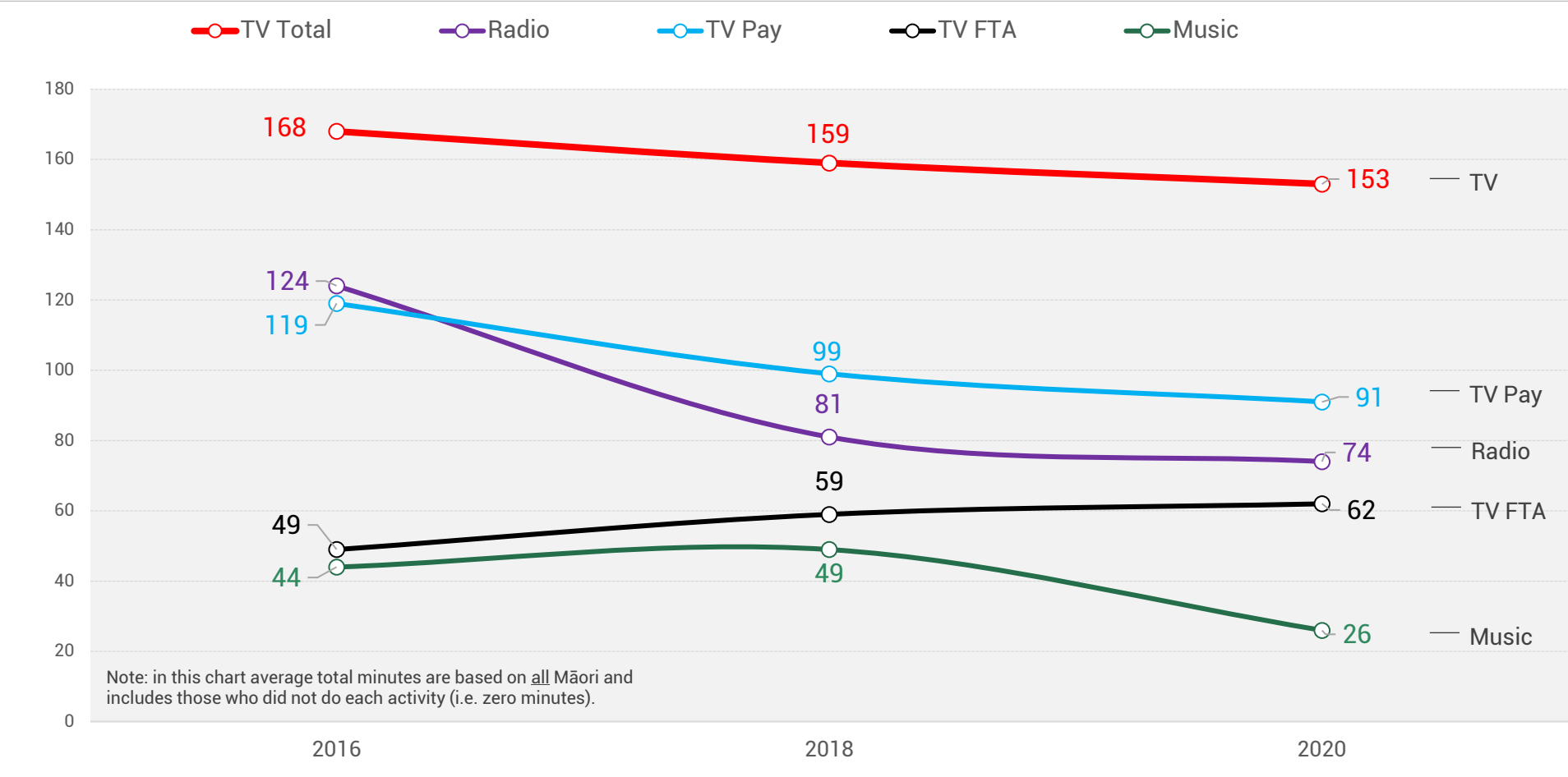


Note: in this chart average total minutes are based on all New Zealanders & Māori and includes those who did not do each activity (i.e. zero minutes).

Time spent using all traditional media has declined since 2018, but with the exception of music (physical formats) this has been a slow decline, and in fact viewing TV on a free to air platform has increased slightly.

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

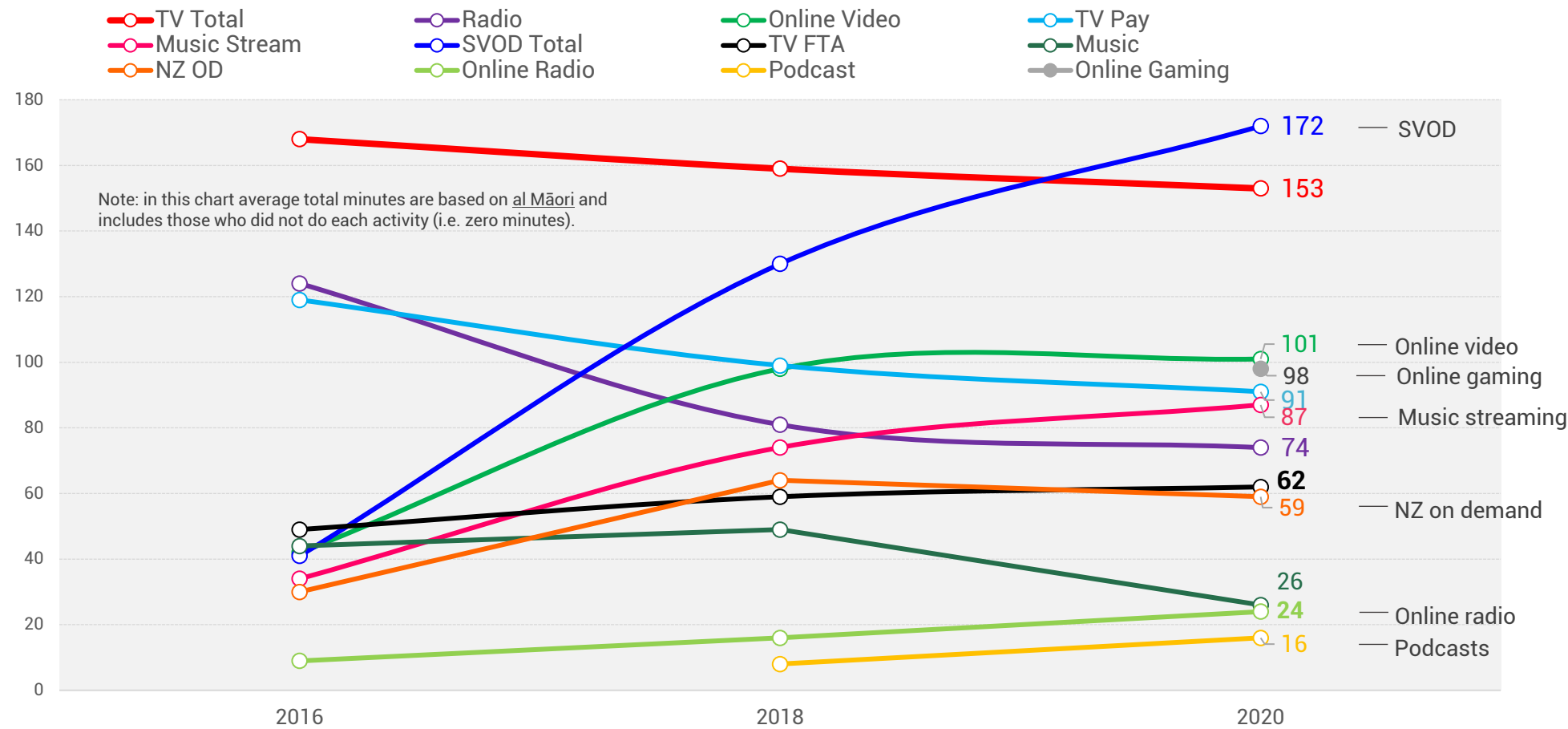
Q: Between (TIME PERIOD) about how long did you do (activity) for?



Growth in time spent viewing has also been slow for nearly all digital media. Perhaps the reason for that is the significant growth in time spent watching SVOD since 2018. Attention dedicated to this media has grown from just over two hours in 2018 to nearly three hours per day in 2020 which may have impacted on the potential growth of other media.

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

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



How do audiences vary across different media?

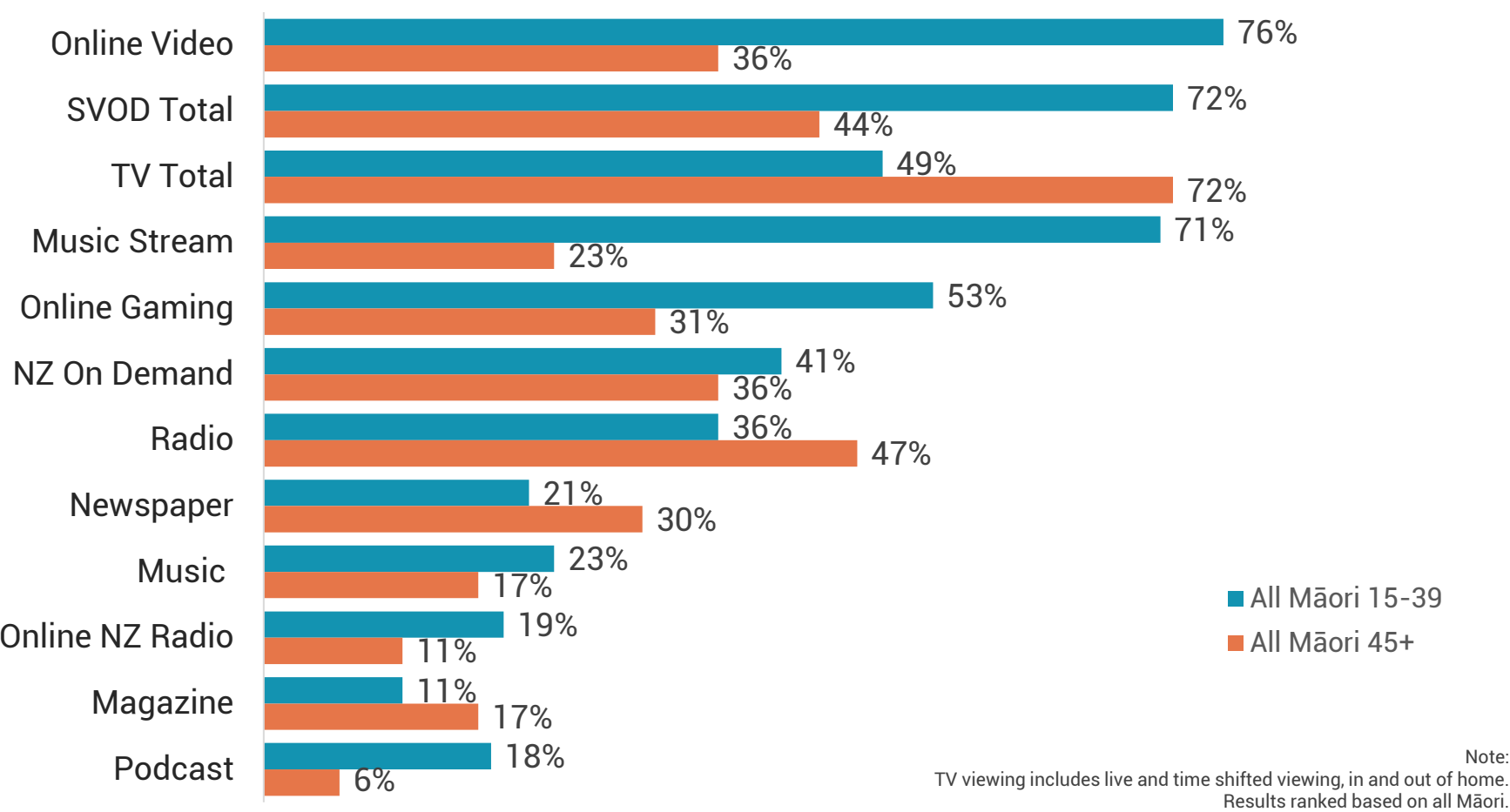


The generation gap evident in media consumption among all New Zealanders also applies to Māori audiences. This gap is typically seen between the ages of 40-49, with younger Māori more likely to consume digital media and older Māori more likely to consume traditional media.



Daily reach of media 2020 – Māori 15-39 cf. Māori 45+

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.



What is the daily profile of Māori consumers of different media?

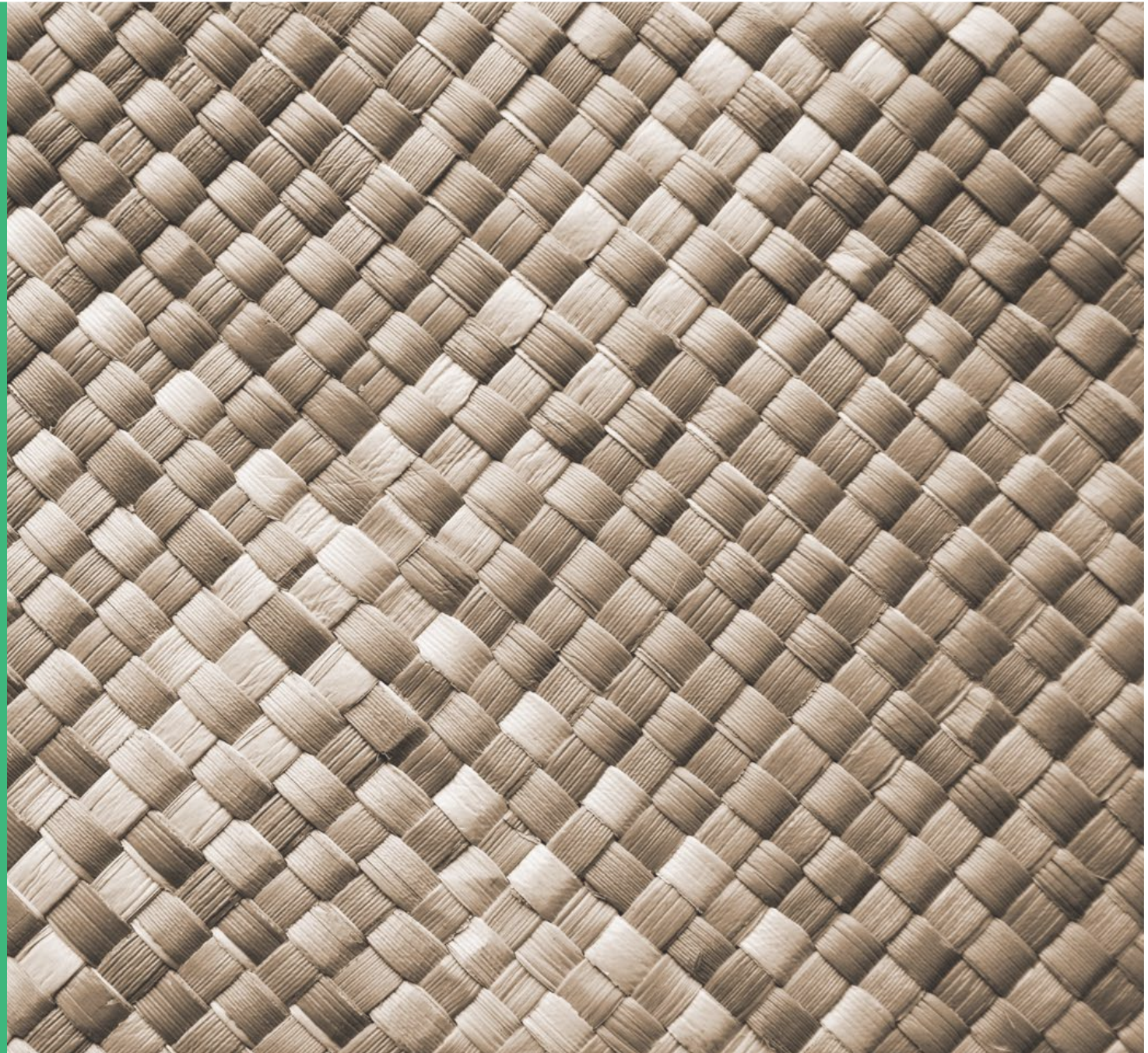
MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Linear TV 57% daily reach overall	<ul style="list-style-type: none"> 15-24 year olds (43%) <ul style="list-style-type: none"> Students (40%) Home-makers (43%) Younger, no kids (44%) Aucklanders (49%) 	<ul style="list-style-type: none"> 50+ year olds (75%) <ul style="list-style-type: none"> retirees (74%) empty nesters (70%) Upper white collar (70%) High income earners (\$120,000+ = 74%) South Islanders (65%)
Online video 61% daily reach overall	<ul style="list-style-type: none"> 50+ year olds (33%) <ul style="list-style-type: none"> Retirees (22%) Empty nesters (34%) 	<ul style="list-style-type: none"> 15-29 year olds (78%) <ul style="list-style-type: none"> Students (94%) Younger, no kids (75%) Upper white collar workers (71%) 3+ person homes (68%)
SVOD 60% daily reach overall	<ul style="list-style-type: none"> 50+ year olds (40%) <ul style="list-style-type: none"> Retirees (37%) Empty nesters (41%) Lower income earners (49%) 	<ul style="list-style-type: none"> 15-29 year olds (74%) <ul style="list-style-type: none"> Students (69%) Upper white collar workers (67%) High income earners (\$150,000+ = 71%)
Radio 40% daily reach overall	<ul style="list-style-type: none"> Females (31%) 15-24 year olds (31%) <ul style="list-style-type: none"> Students (22%) Home-makers (18%) Low income earners (up to \$30,000 = 29%) 	<ul style="list-style-type: none"> Males (50%) 60+ year olds (54%) <ul style="list-style-type: none"> Retirees (55%) Empty Nesters (47%) White collar workers (50%) High income earners (\$120,000+ = 54%)

What is the daily profile of Māori consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Music streaming 51% daily reach overall	<ul style="list-style-type: none"> 45+ year olds (23%) <ul style="list-style-type: none"> Retirees (22%) Empty nesters (24%) 	<ul style="list-style-type: none"> 15-29 year olds (77%) <ul style="list-style-type: none"> Students (71%) Younger, no kids (67%)
On demand 40% daily reach overall		<ul style="list-style-type: none"> Upper white collar workers (71%)
Newspaper 23% daily reach overall	<ul style="list-style-type: none"> Females (17%) Home-makers (7%) Students (14%) Unemployed (15%) 	<ul style="list-style-type: none"> Males (30%) 60+ year olds (48%) <ul style="list-style-type: none"> Retirees (50%) Empty nesters (32%) Upper white collar workers (36%)
Magazine 13% daily reach overall	<ul style="list-style-type: none"> Students (1%) Unemployed (5%) 	<ul style="list-style-type: none"> 65+ year olds (33%) <ul style="list-style-type: none"> Retirees (33%) Upper white collar workers (23%)



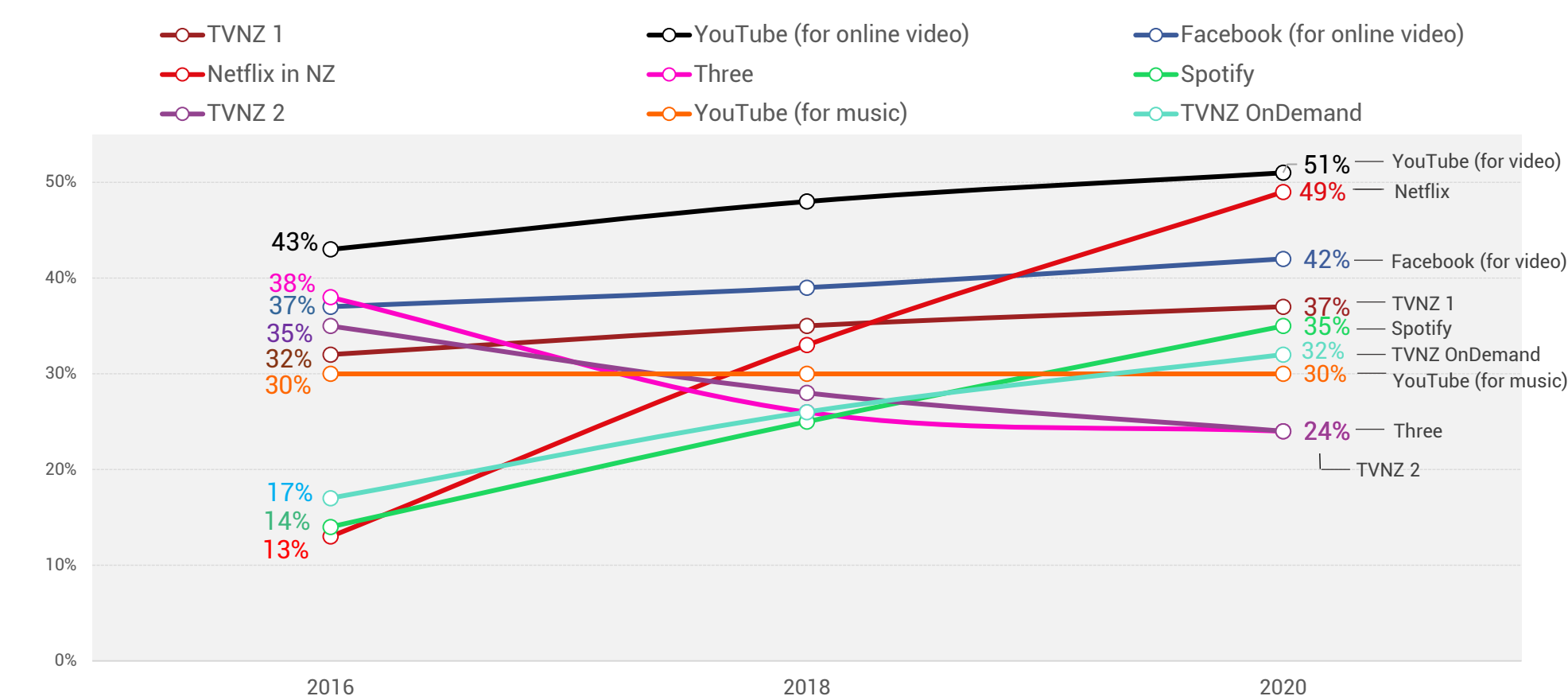
Daily Media Consumption By Channel, Site & Station



Most popular channels, sites and stations 2020. YouTube remains the most popular site, channel or station but Netflix has continued to grow rapidly in popularity among Māori, overtaking TVNZ 1 and Facebook since 2018. Spotify and TVNZ OnDemand have also continued to grow significantly in audience size since 2018, while other channels, sites and stations are more stable.

Most popular channels, sites & stations – all Māori 15+

Q: Which of the following did you use yesterday?

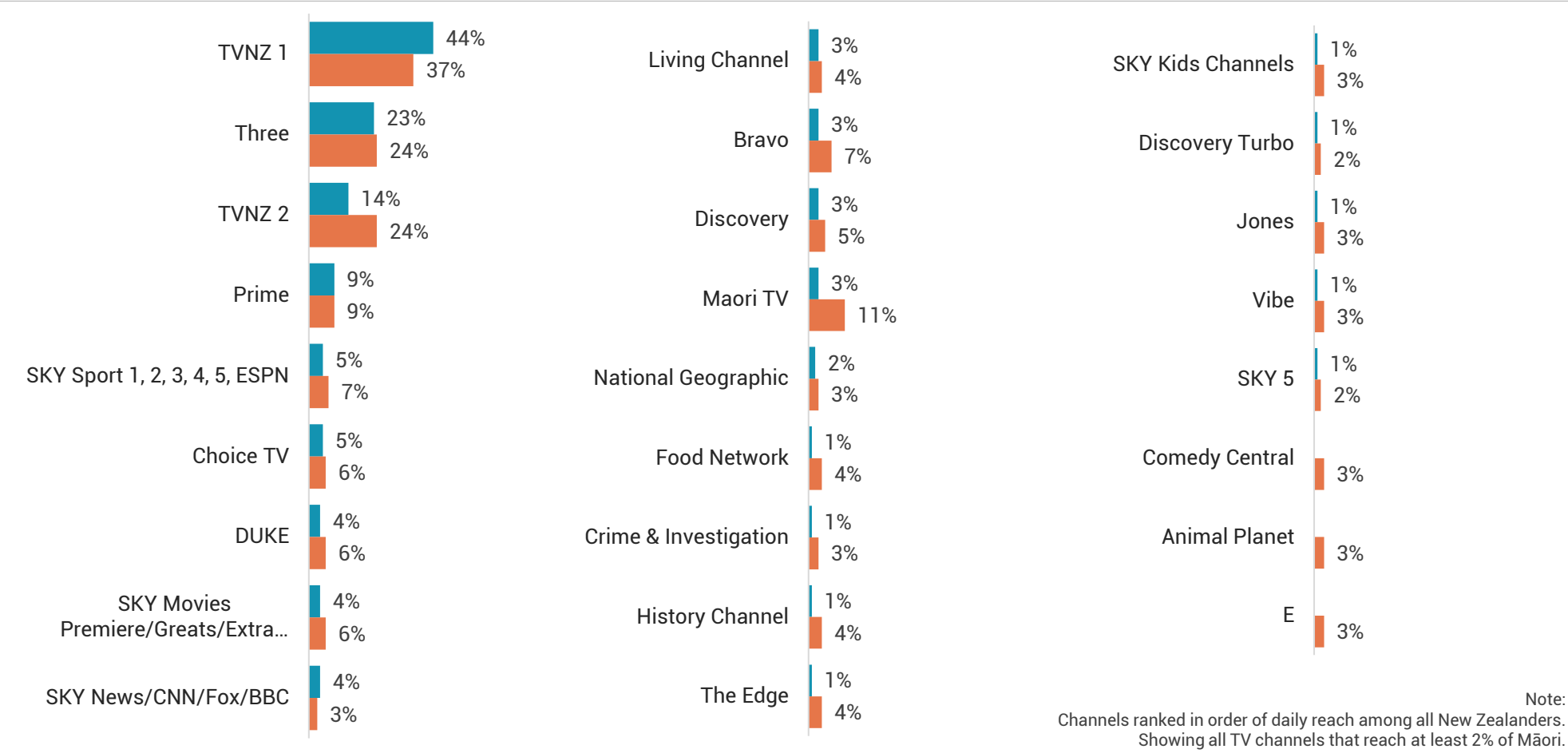


- Next six:
- Disney Plus 15%
 - Māori TV 11%
 - Stuff (video) 11%
 - Mai FM 9%
 - Prime 9%
 - NZ Herald 9%

Māori watch nearly all TV channels more than New Zealanders 15+ overall. In particular TVNZ 2 and Māori Television attract a significantly higher proportion of viewers. TVNZ 1 is slightly less popular.

Daily reach of TV channels 2020 (2% reach and over) – all New Zealanders 15+ & all Māori 15+

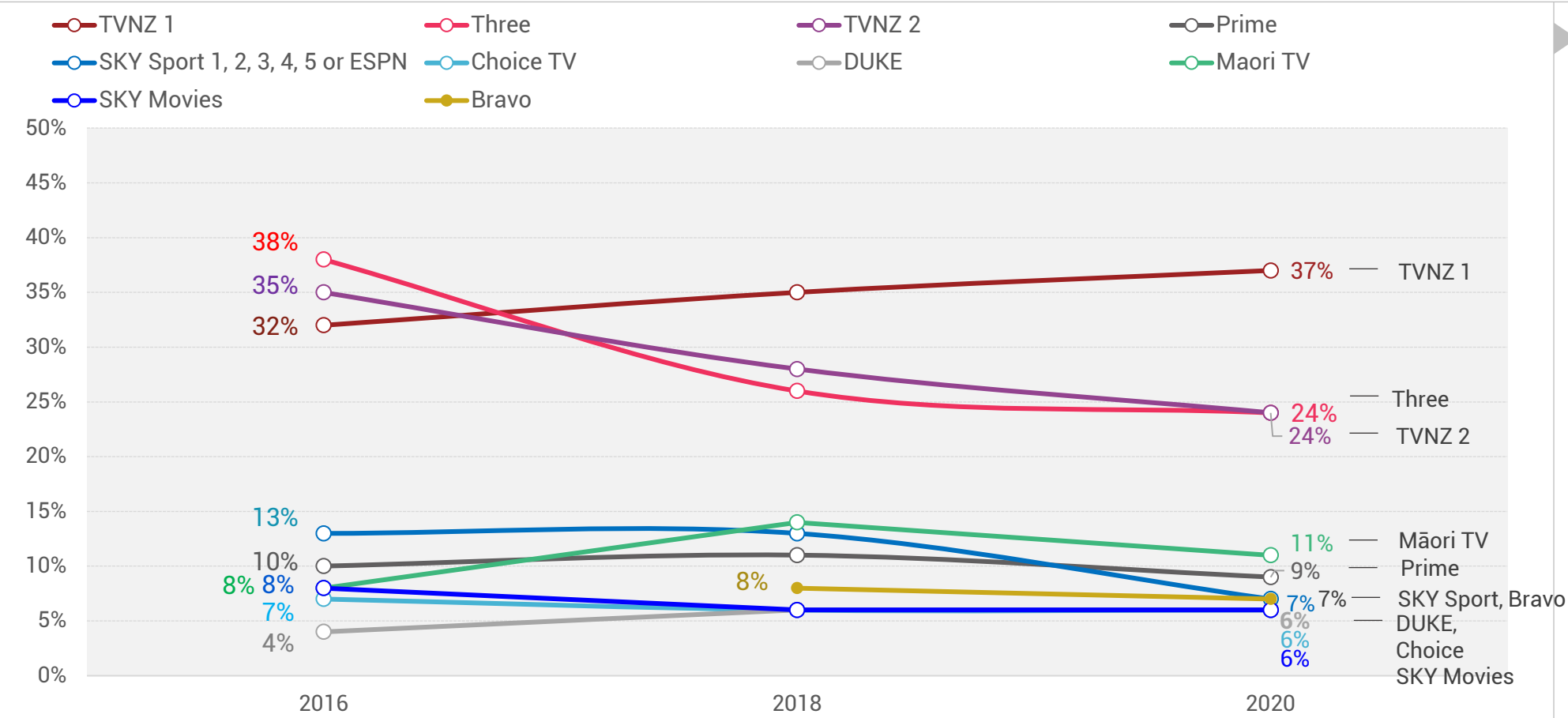
Q: Thinking about yesterday, which of the following TV channels did you watch?



Despite the decline of the linear TV audience overall, TVNZ 1's daily audience has grown slightly since 2018 while nearly all other TV channels have declined. TVNZ 1's growth will be driven in part by this channel being New Zealanders' most widely used and trusted source of news during the Covid-19 outbreak.

Daily reach of TV channels (6% reach and over) – all Māori 15+

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



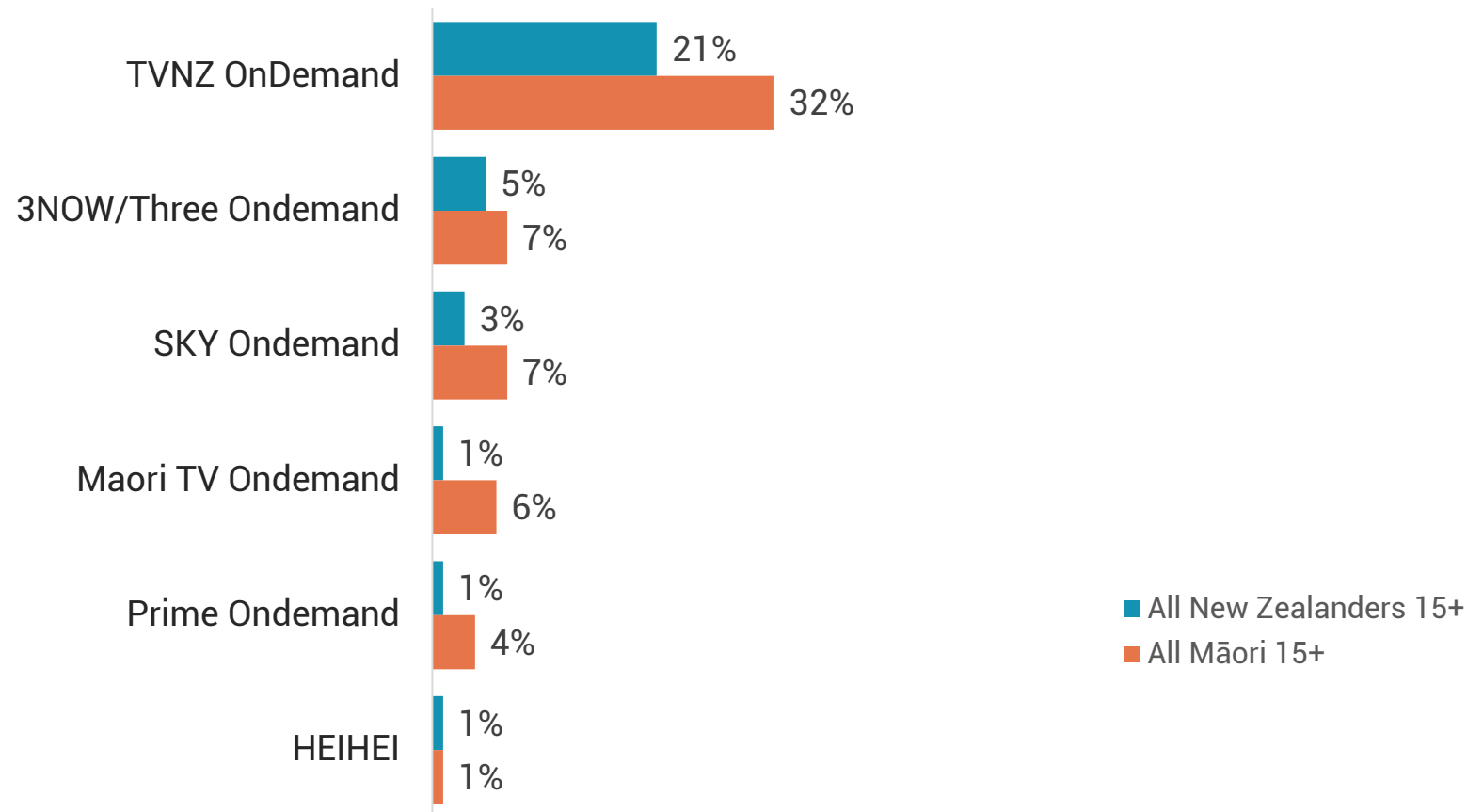
SKY Sport has declined since 2018, however this decline will be driven by the absence of sport during the survey period.

All on demand sites are more widely used by Māori than New Zealanders 15+, and especially TVNZ OnDemand to which one in three Māori tune in each day.



Daily reach of on demand sites 2020 – All New Zealanders 15+ & all Māori 15+

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

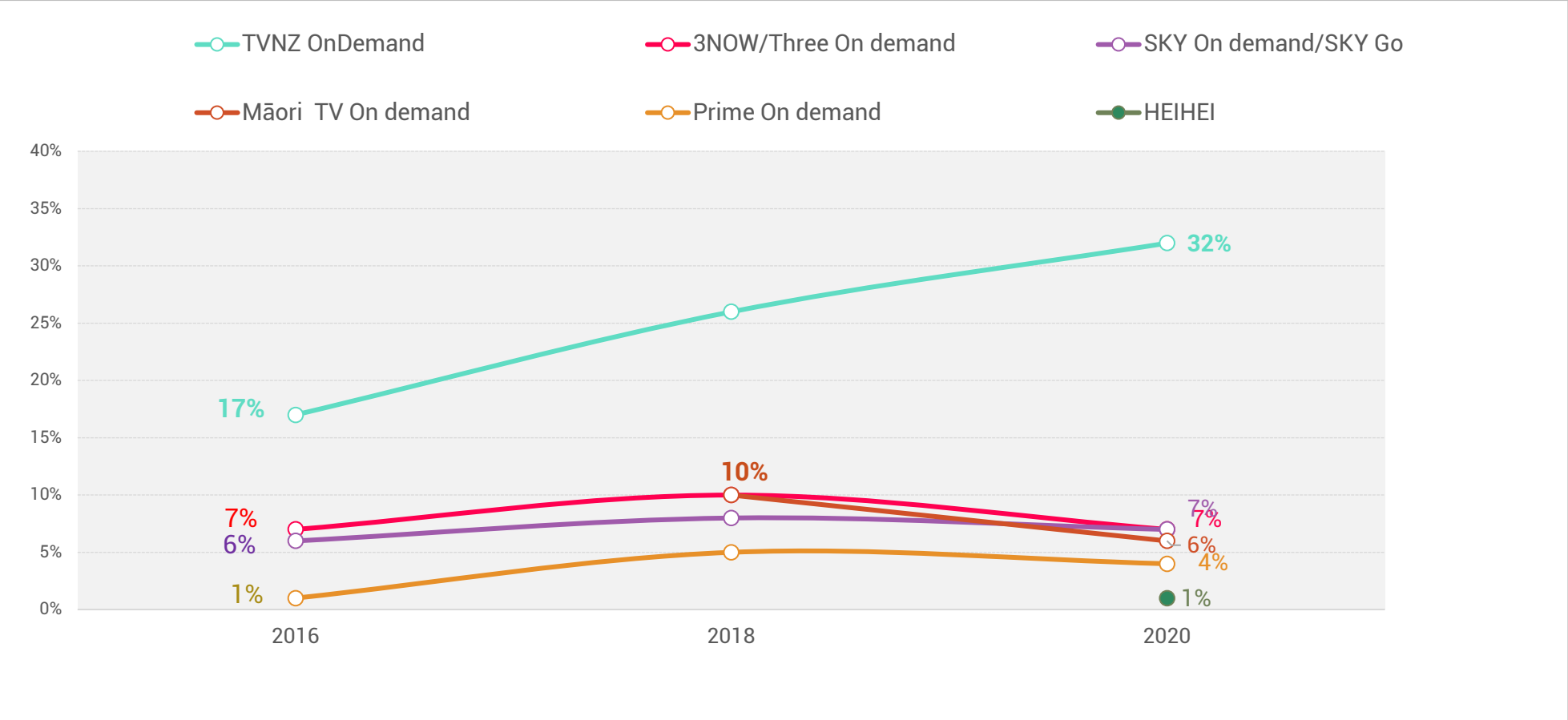


TVNZ OnDemand is the most popular on demand site among Māori by a significant margin and, unlike other sites, has continued to grow its audience since 2018.



Daily reach of on demand sites – all Māori 15+

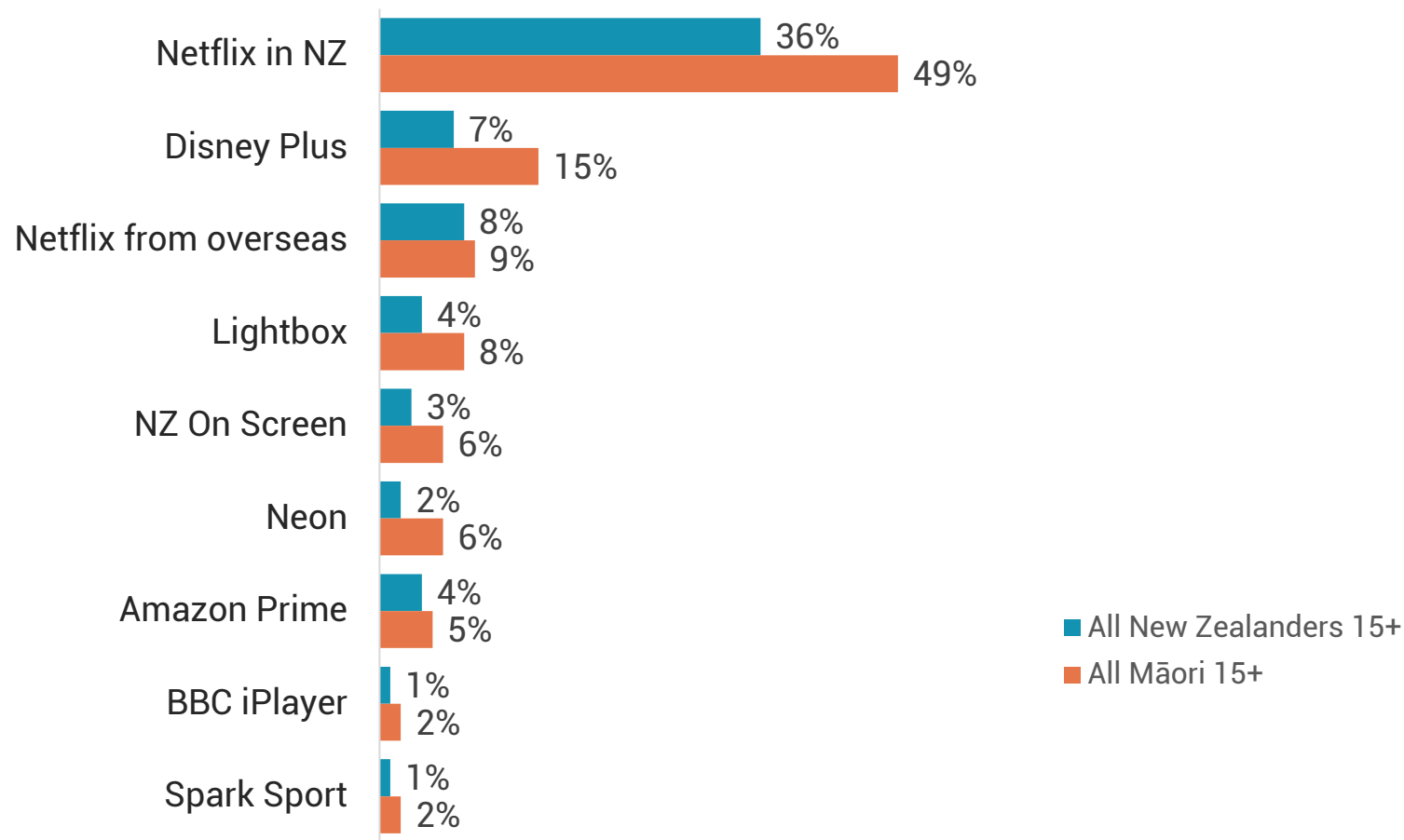
Q: Thinking about yesterday overall, which of the following websites did you watch?



As with other media, a greater proportion of Māori use SVOD sites than overall New Zealanders. Netflix reaches one in two Māori each day and is easily the most popular site, followed by Disney Plus.

Daily reach of SVOD sites 2020 – All New Zealanders 15+ & all Māori 15+

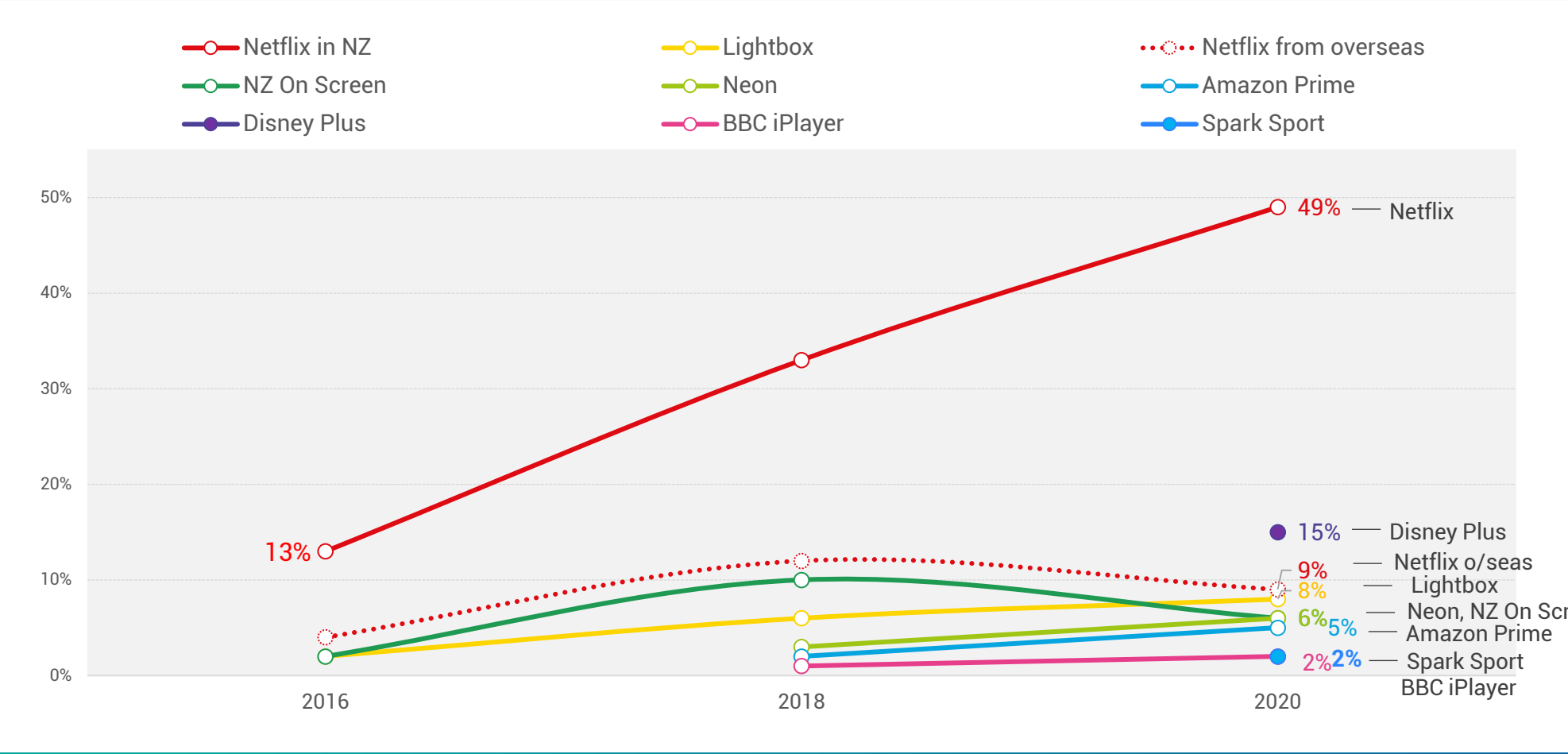
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Netflix is not only the dominant SVOD provider among Māori, but the only one to show significant growth since 2018. The only exception is the popularity of Disney Plus now reaching 15% of Māori each day and which wasn't available in 2018.

Daily reach of SVOD sites – all Māori 15+

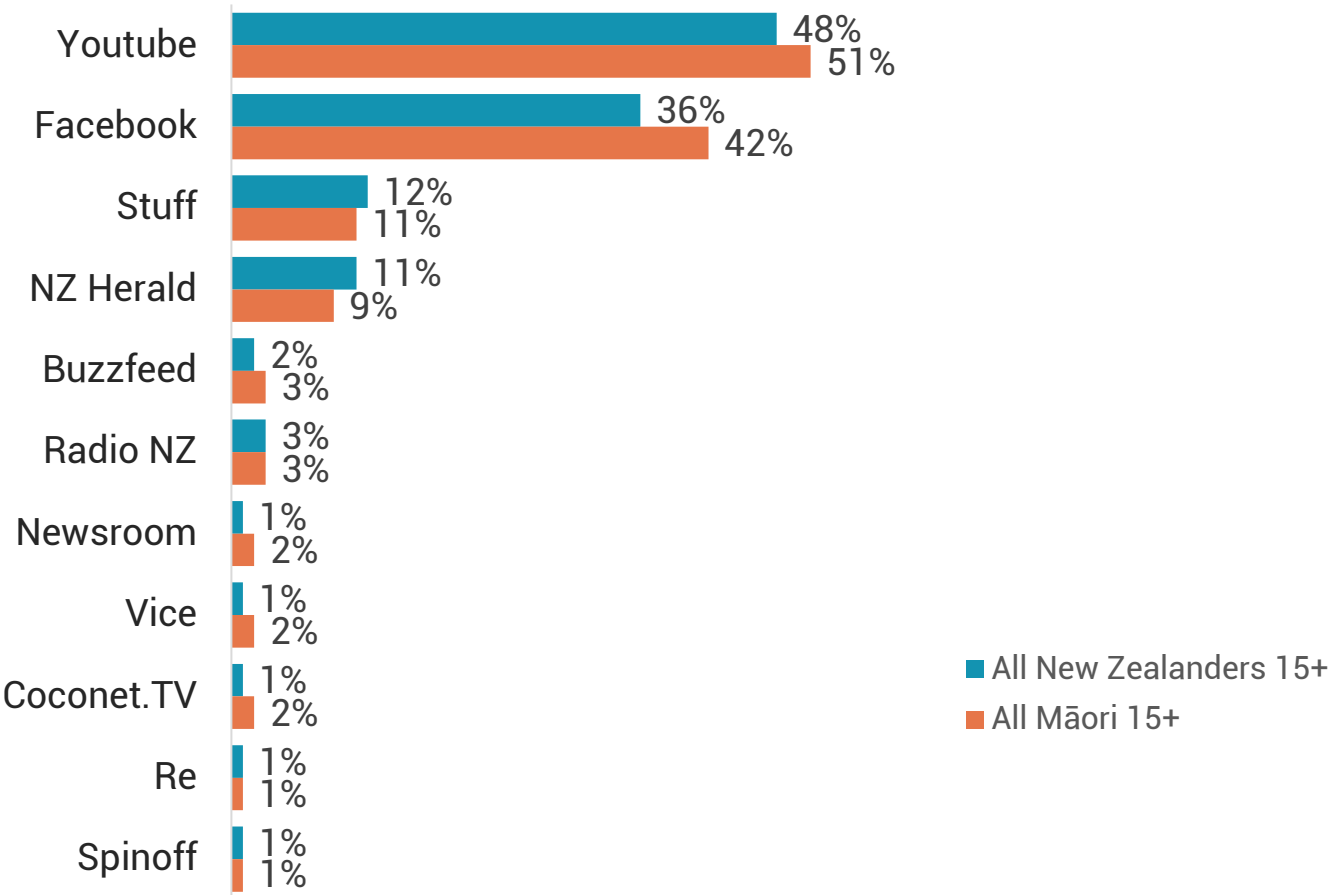
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



The disparity between the media behaviour of Māori and New Zealanders is less pronounced in terms of the online video sites they use. YouTube reaches one in two Māori each day and Facebook reaches slightly more than four in ten.

Daily reach of online video sites 2020 – All New Zealanders 15+ & all Māori 15+

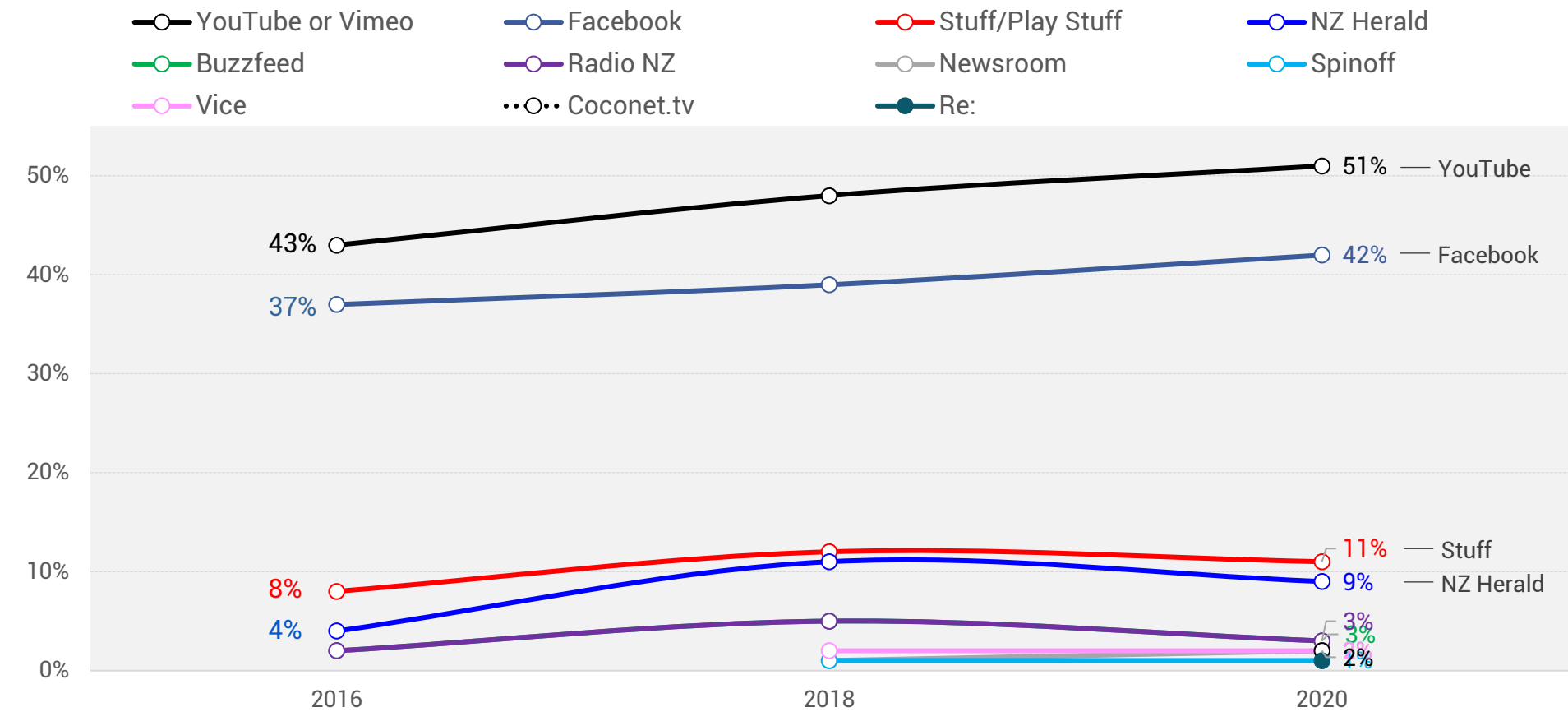
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Both YouTube and Facebook have continued to slowly increase their daily audience size since 2018, with no other provider showing audience growth.

Daily reach of online video sites – all Māori 15+

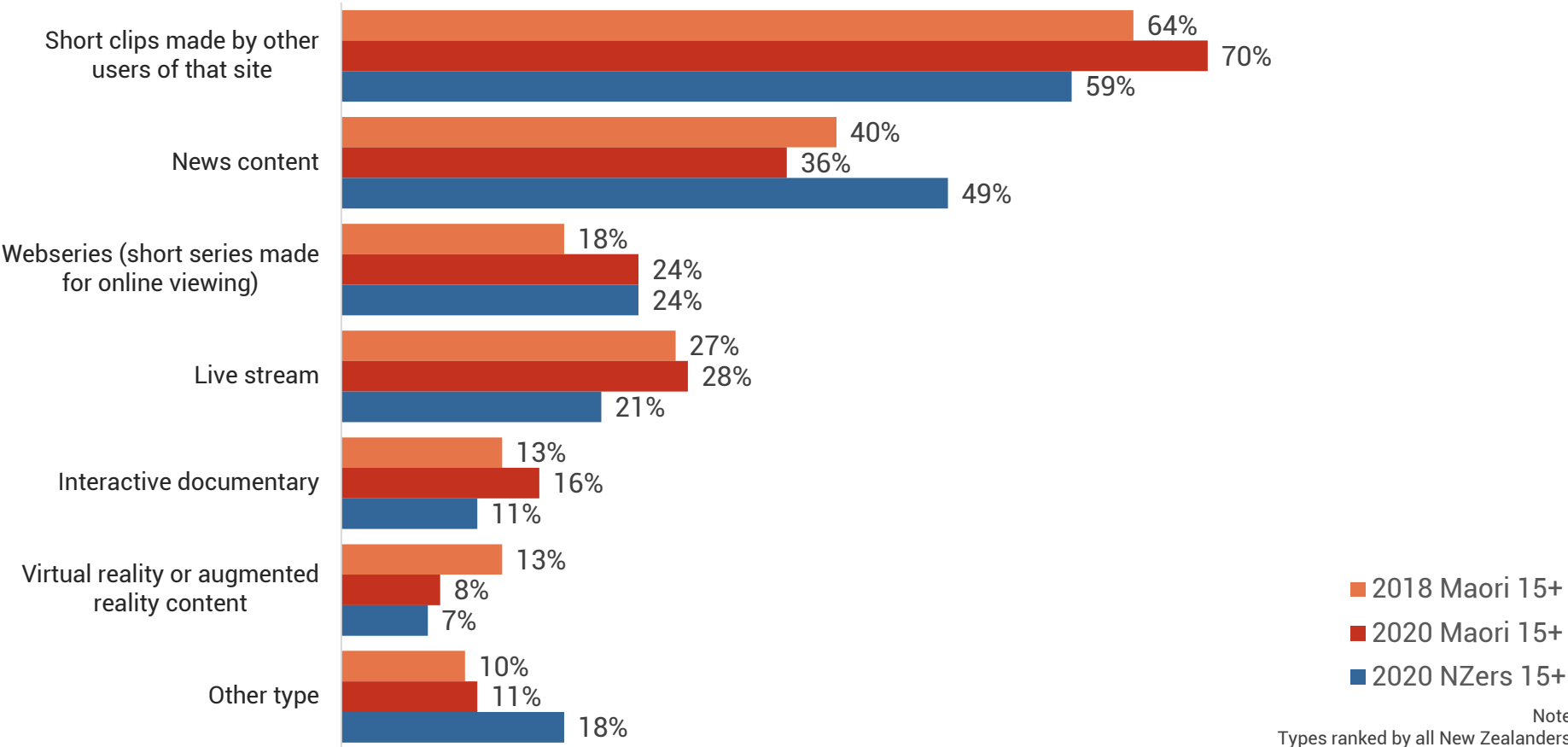
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Māori are significantly more likely to watch short user generated clips than overall New Zealanders and this has grown since 2018. Conversely Māori are significantly less likely to watch news video online.

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

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

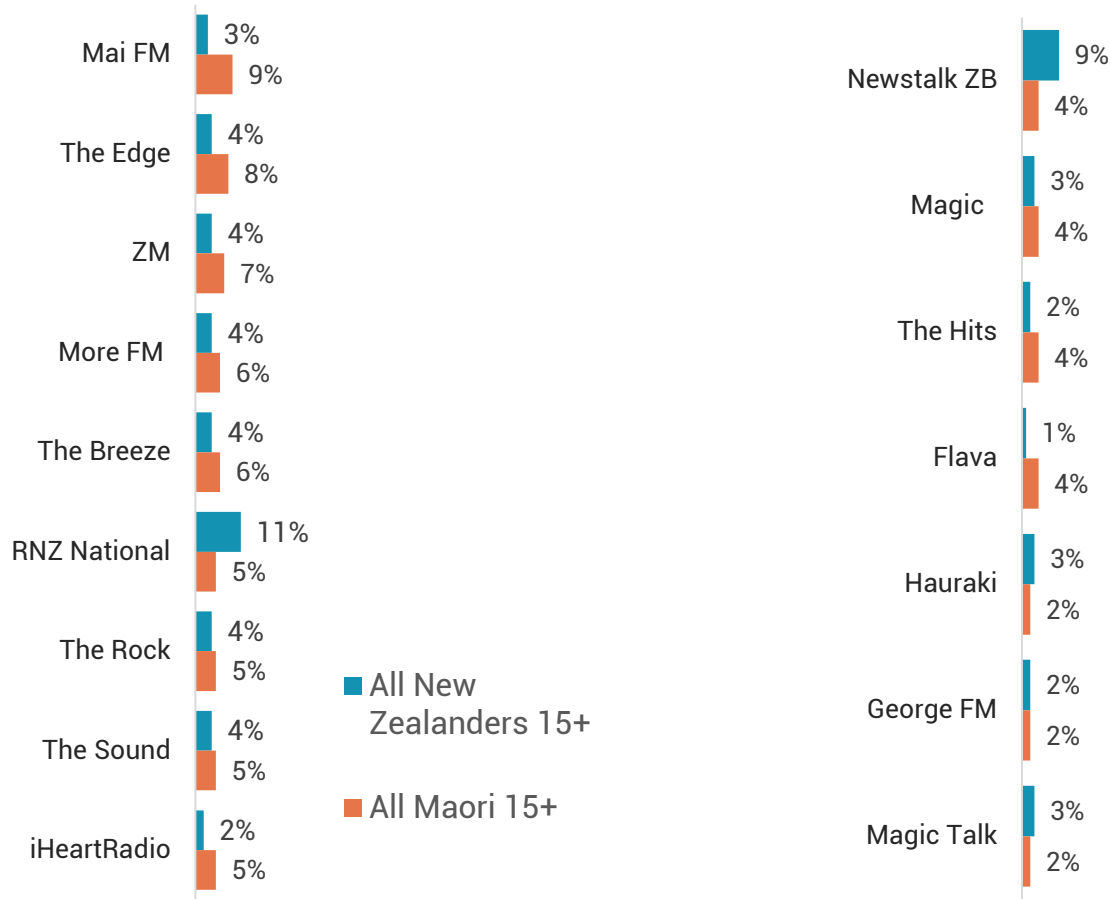


Note:
Types ranked by all New Zealanders.

Mai FM is the most popular radio station followed by The Edge, each reaching nearly one in ten Māori each day and are significantly more popular than among overall New Zealanders. Māori are more likely to listen to most radio stations except for news based stations such as RNZ National and Newstalk ZB.

Daily reach of radio stations 2020 (stations 2% and above) – all New Zealanders 15+ and all Māori 15+

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

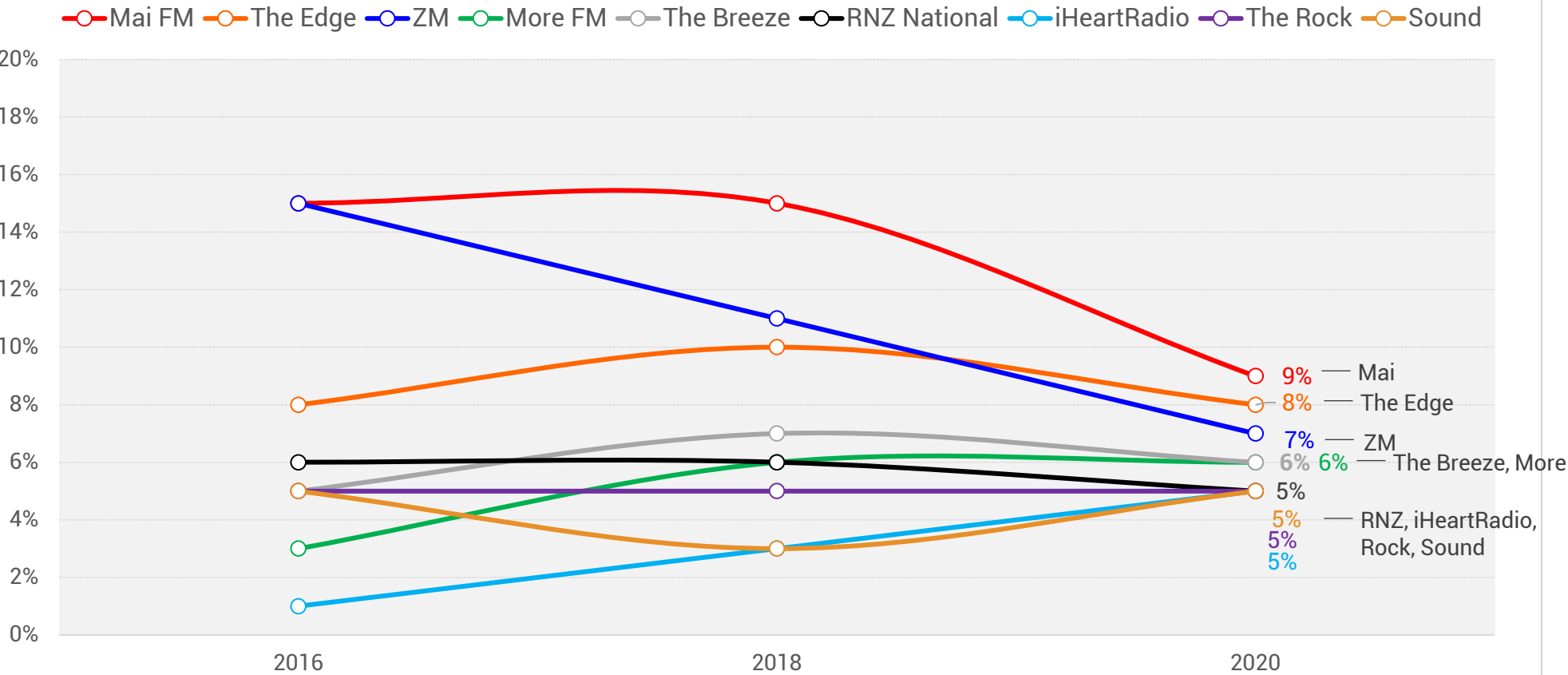


All three of the most popular radio stations among Māori show audience declines since 2018, and the remainder are stable. The one exception is the growth of iHeartRadio, which is consistent with the growth in streamed music overall among Māori.



Daily reach of radio stations over time (5% reach and above) – all Māori 15+

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

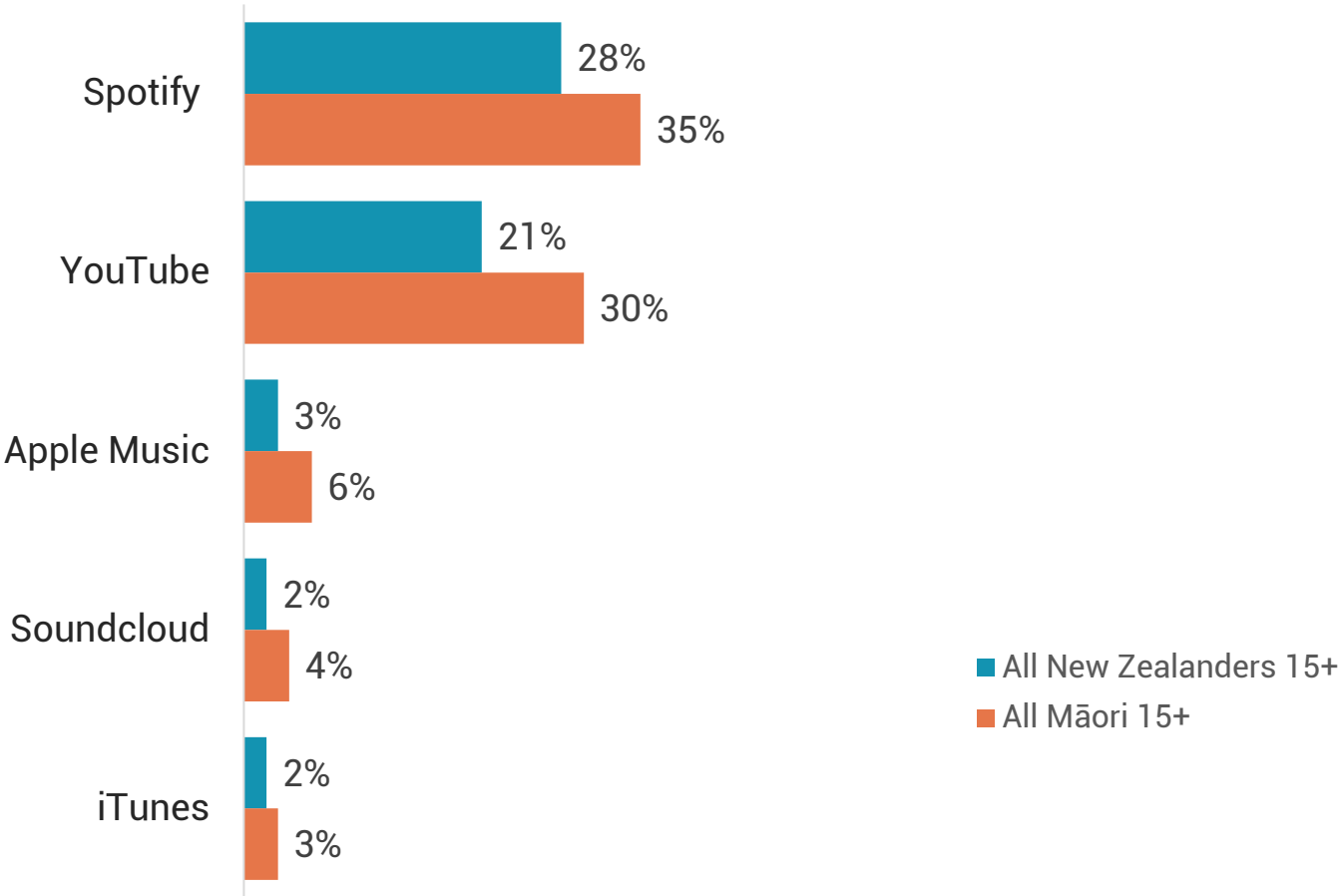


Both Spotify and YouTube reach about one third of Māori each day with Spotify slightly more popular than YouTube for listening to music.



Daily reach of music streaming sites 2020 – All New Zealanders 15+ & all Māori 15+

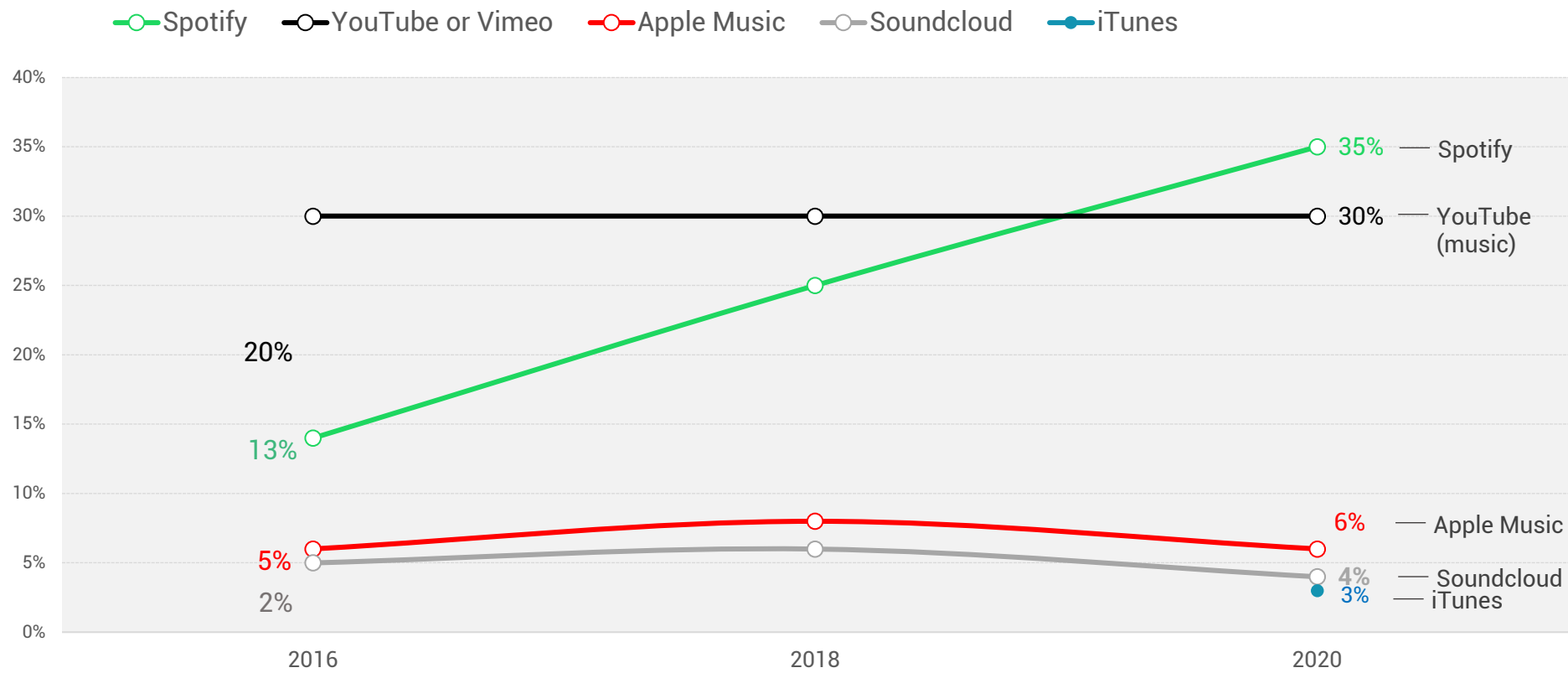
Q: Thinking about yesterday overall, which of the following websites did you use listen to music?



Since 2018 Spotify has overtaken YouTube as the most widely used source of streamed music among Māori. All other sites are stable in terms of audience size.

Daily reach of music streaming sites – all Māori 15+

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





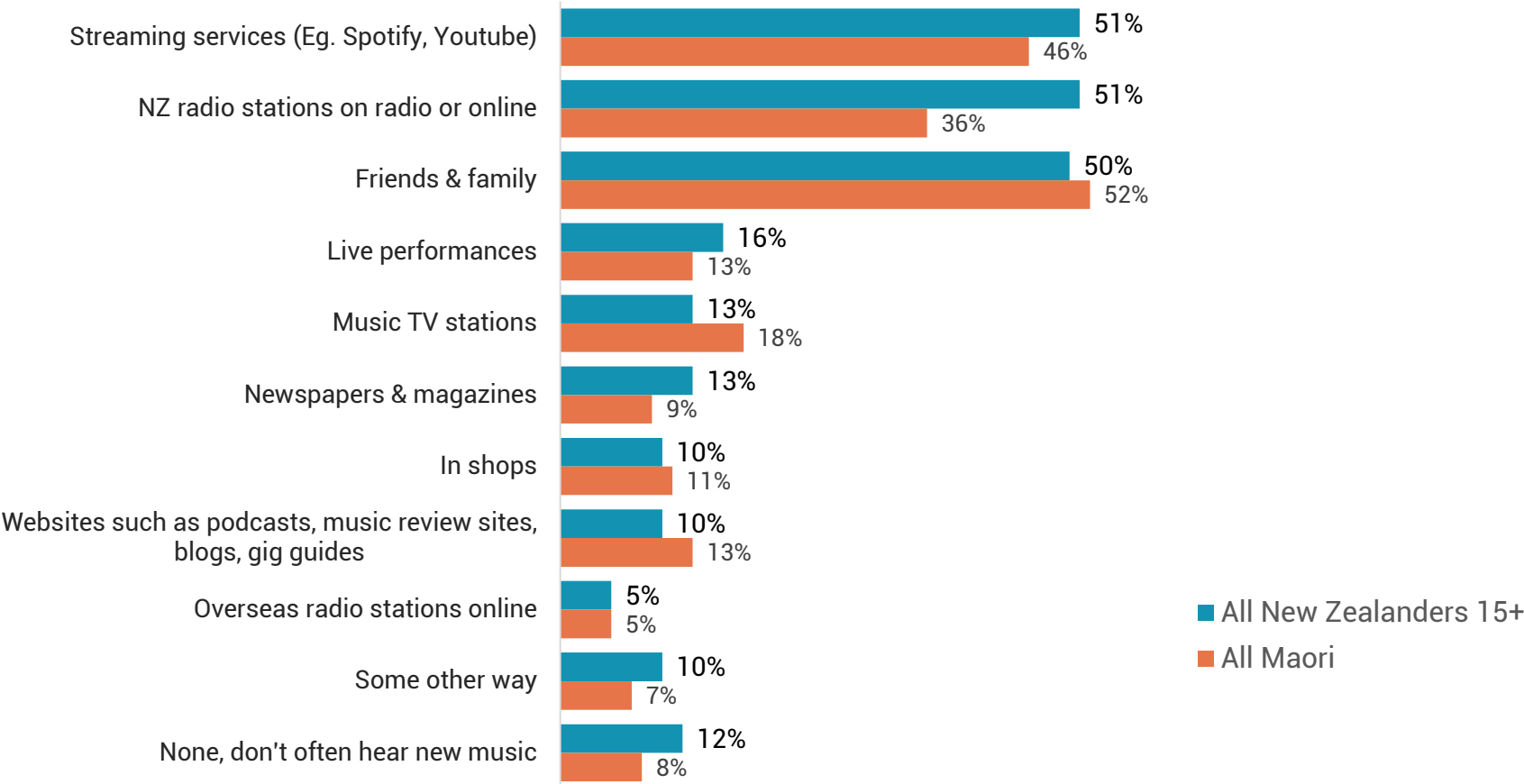
Music Consumption and Behaviour



Word of mouth from friends and family is the most common source of new music among Māori, followed by music streaming services. As per their reduced radio listening overall, Māori are significantly less likely to find new music through the radio but this remains their third most common source.

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

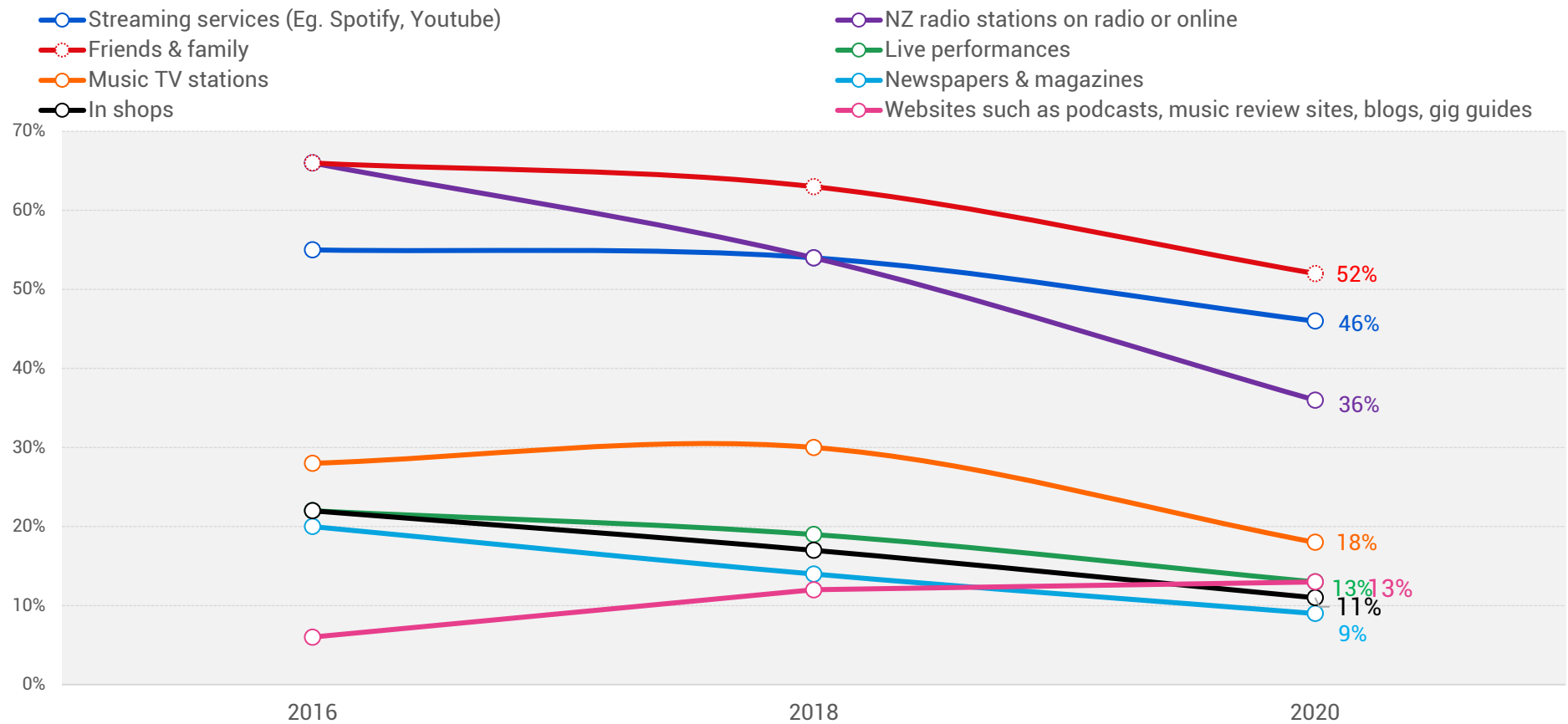
Q: In which of the following ways, if any, do you usually find out about new music?



Nearly all sources of new music have declined since 2018, but in particular the influence of radio has dropped from 54% in 2018 and 66% in 2016.

Sources of awareness of new music over time – all Māori 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.



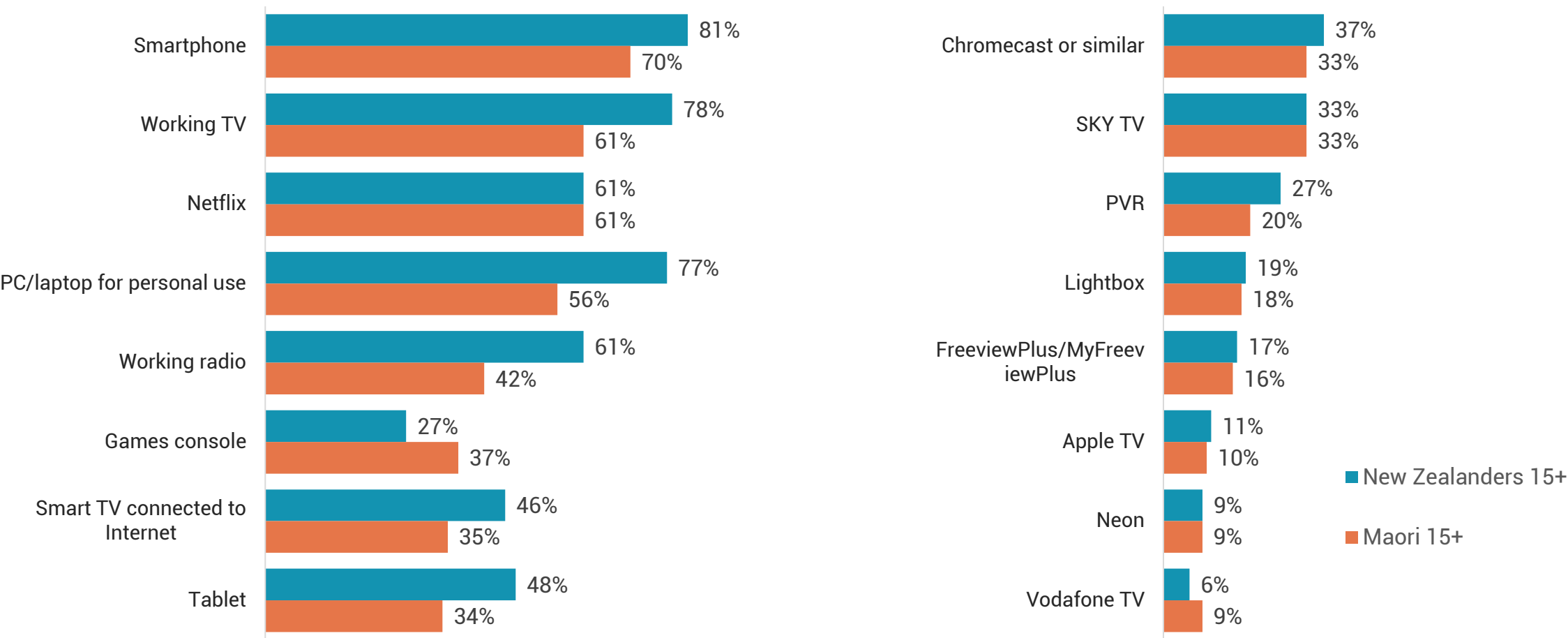
Devices Personally Own Or Have Daily Access To



Despite higher levels of media consumption overall Māori are typically less likely to be able to access most devices and platforms. The exceptions are higher incidences of access to Netflix and gaming consoles.

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

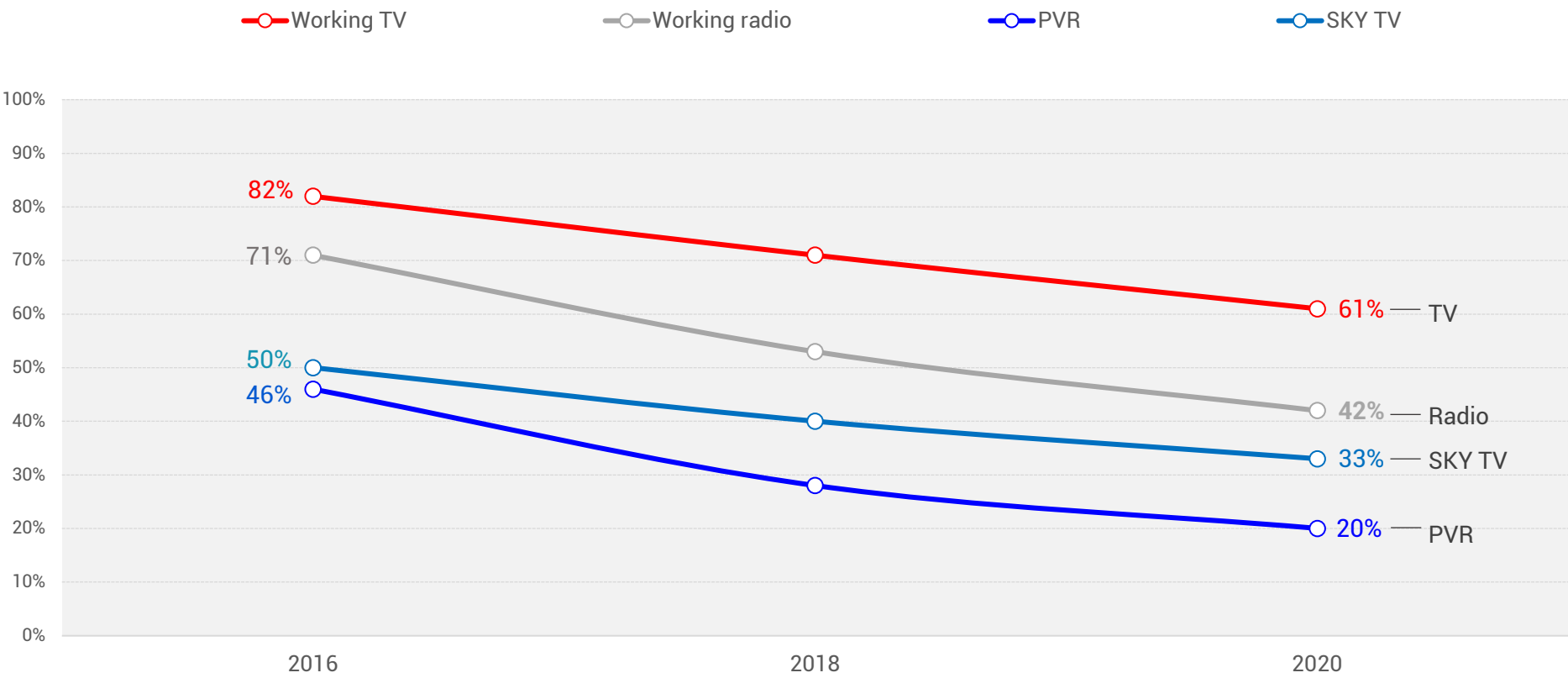
Q: Which of the following, if any, do you personally own or have daily access to?



The incidence of all devices and platforms through which Māori access traditional media has declined since 2018.

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

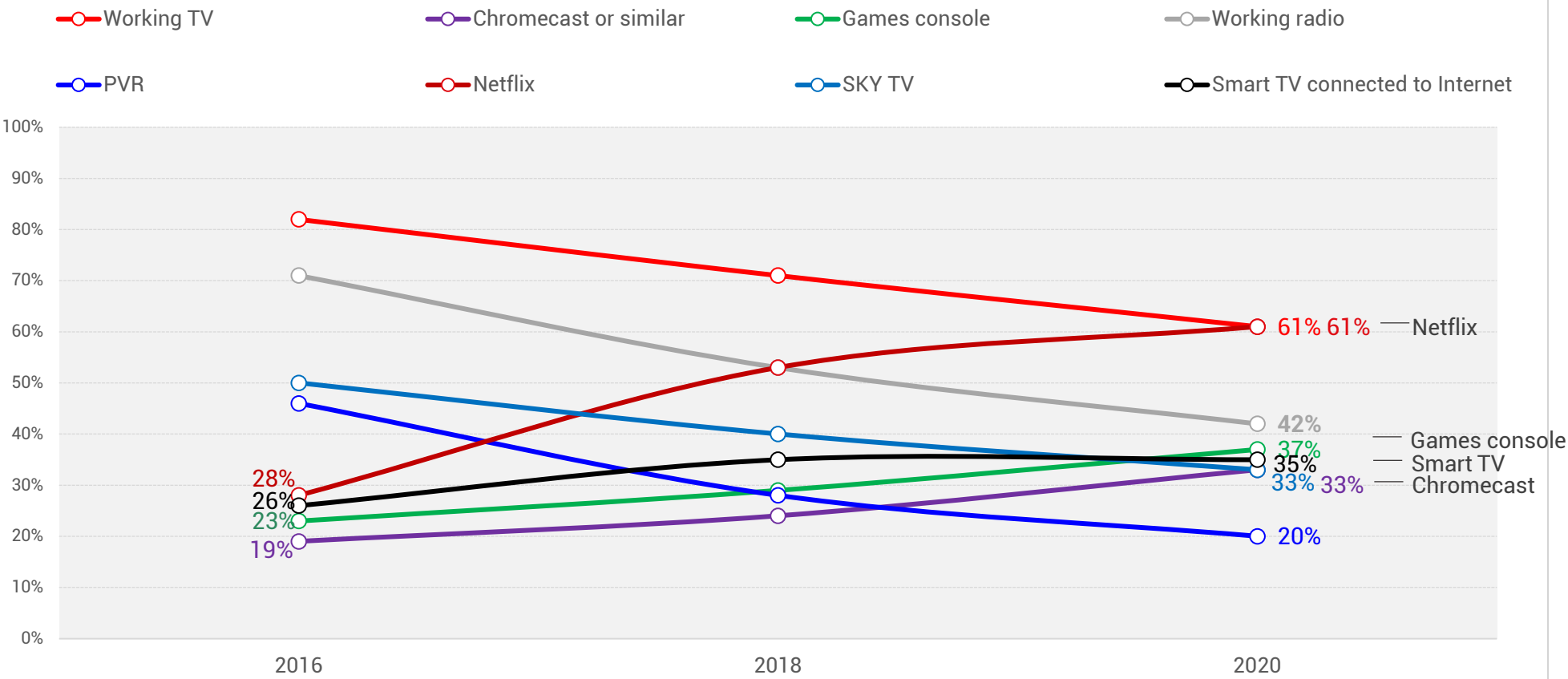
Q: Which of the following, if any, do you personally own or have daily access to?



Conversely Netflix, Chromecast or similar, and gaming consoles continue to increase in incidence among Māori.

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

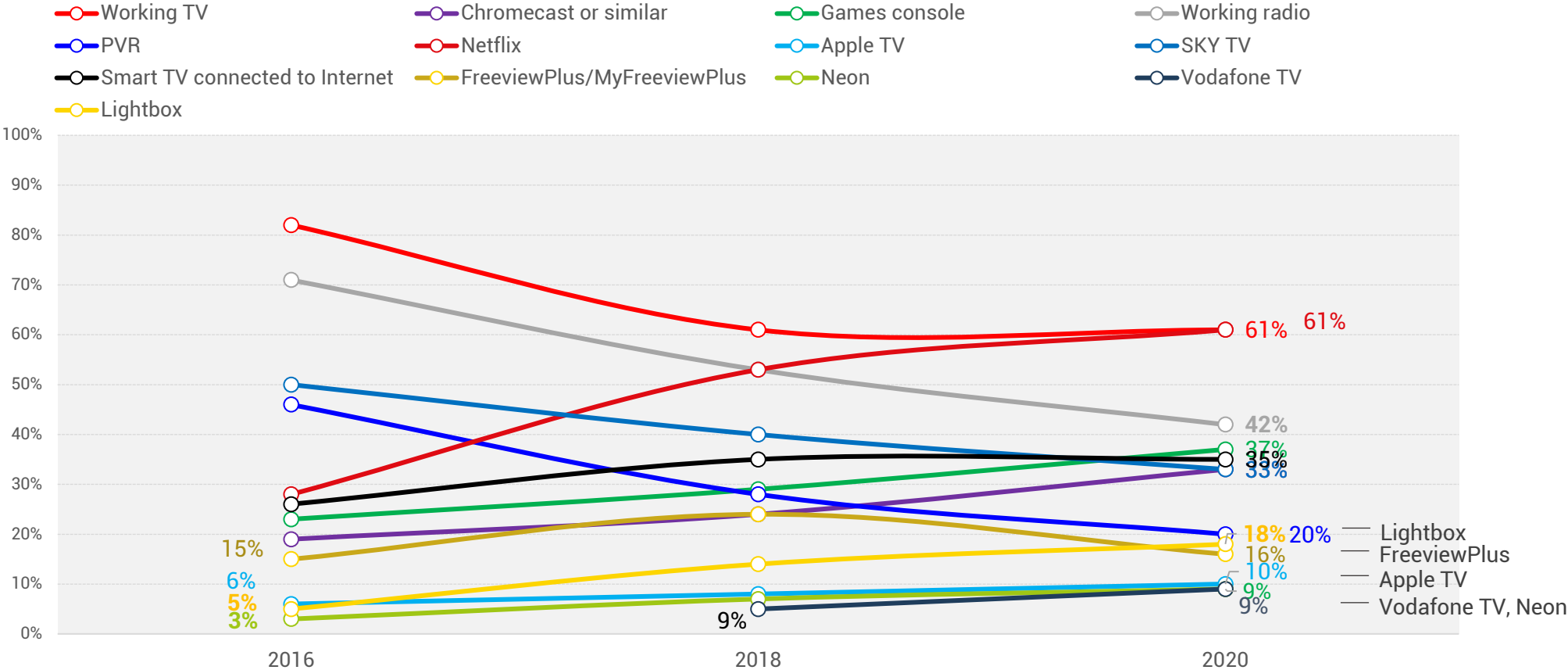
Q: Which of the following, if any, do you personally own or have daily access to?



FreeviewPlus/MyFreeviewPlus, Vodafone TV, Neon and Apple TV have not increased in incidence since 2018, however Lightbox has increased to be nearly as common as a PVR among Māori.

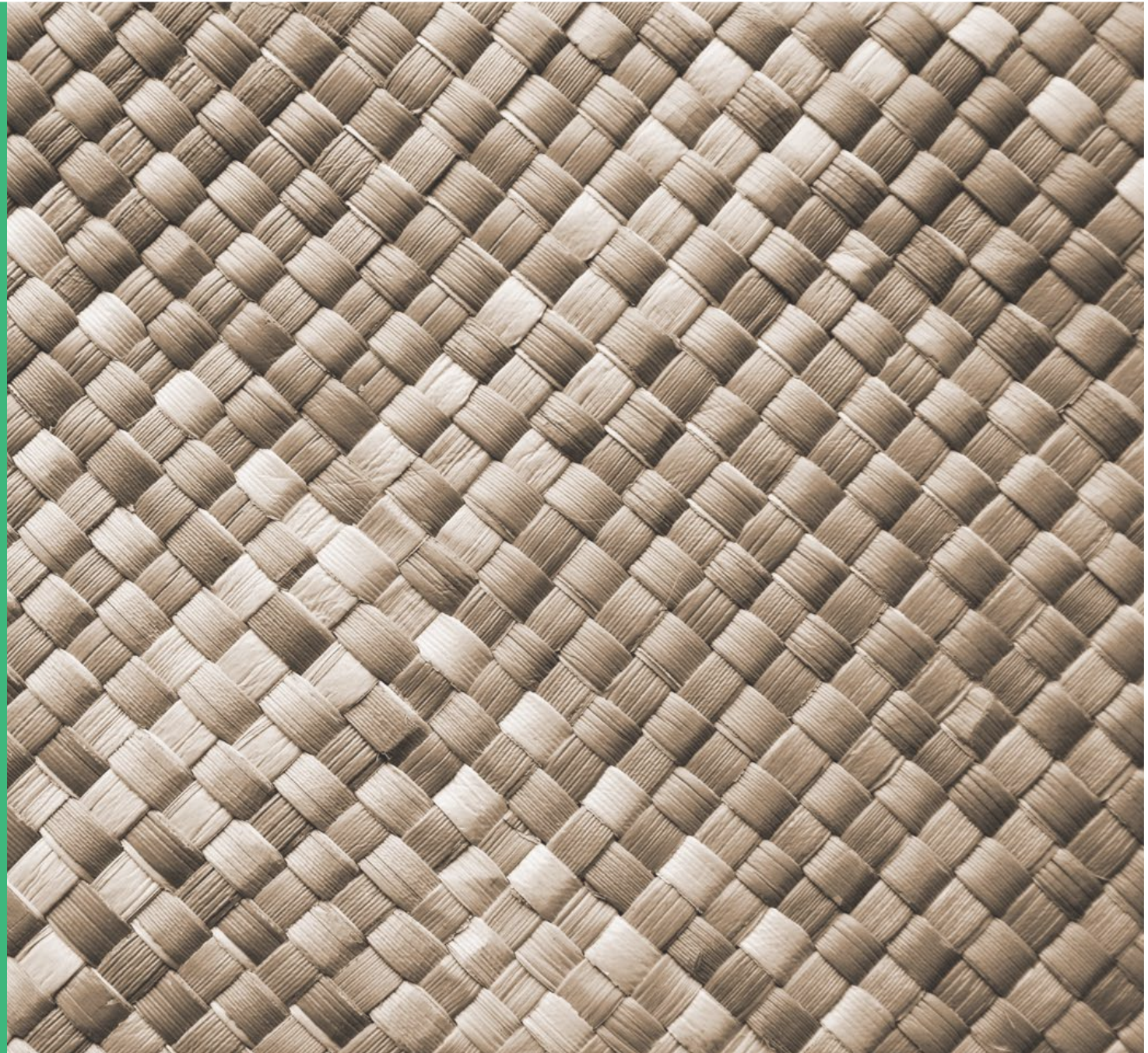
Devices & platforms personally own or have daily access to – all Māori 15+

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





Sources of news during Covid-19 lockdown

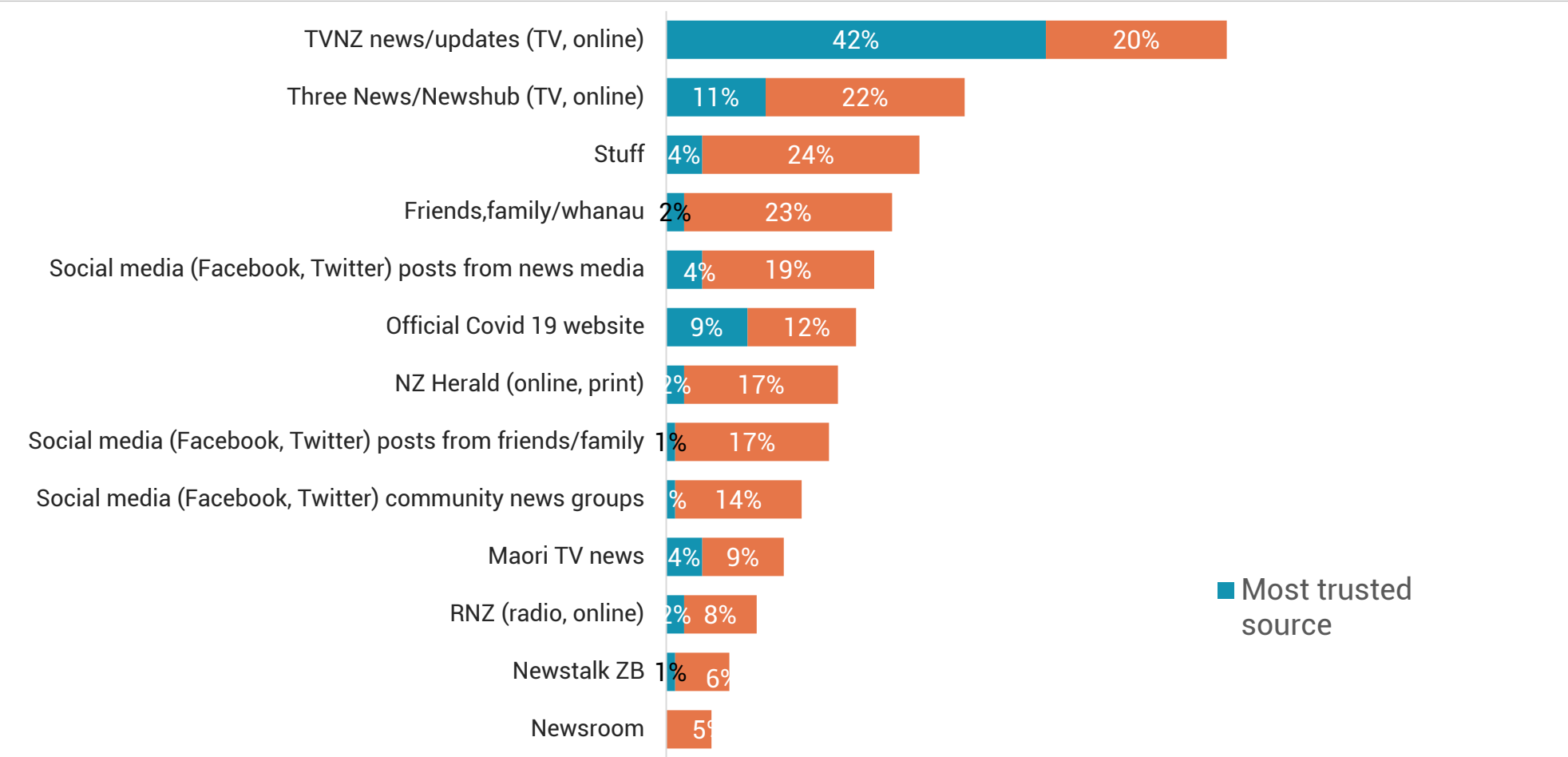


The daily TVNZ 1 Covid-19 updates were Māori's most widely used (62%) and most trusted source of news (42%) by a significant margin – and significantly more so than all New Zealanders. Three News was the second most trusted source followed by the Covid-19 website. Social media was widely used, but it was the most trusted source of very few Māori.



Sources of news and information during COVID 19 lockdown (sources used by 5% or more) – all Māori 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?



- ▶ Compared to all New Zealanders, more Māori used each source of news and information.
- ▶ Māori were also more likely to trust:
 - Three News
 - Maori TV news



WHERE ARE THE **AUDIENCES?**

Māori report

SEPTEMBER 2020