



WHERE ARE THE **AUDIENCES?**

Youth (15-24s) 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:
 - Youth (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 Youth.**
 - It compares the 2014, 2016 and 2018 results among 15-24s, 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.
- 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=262 New Zealanders aged 15-24 on which this report is based.**
- The total sample has a maximum margin for error of +/-2.5%, and the sample of youth has a maximum margin for error of +/-6.0%.

- 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.
- 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

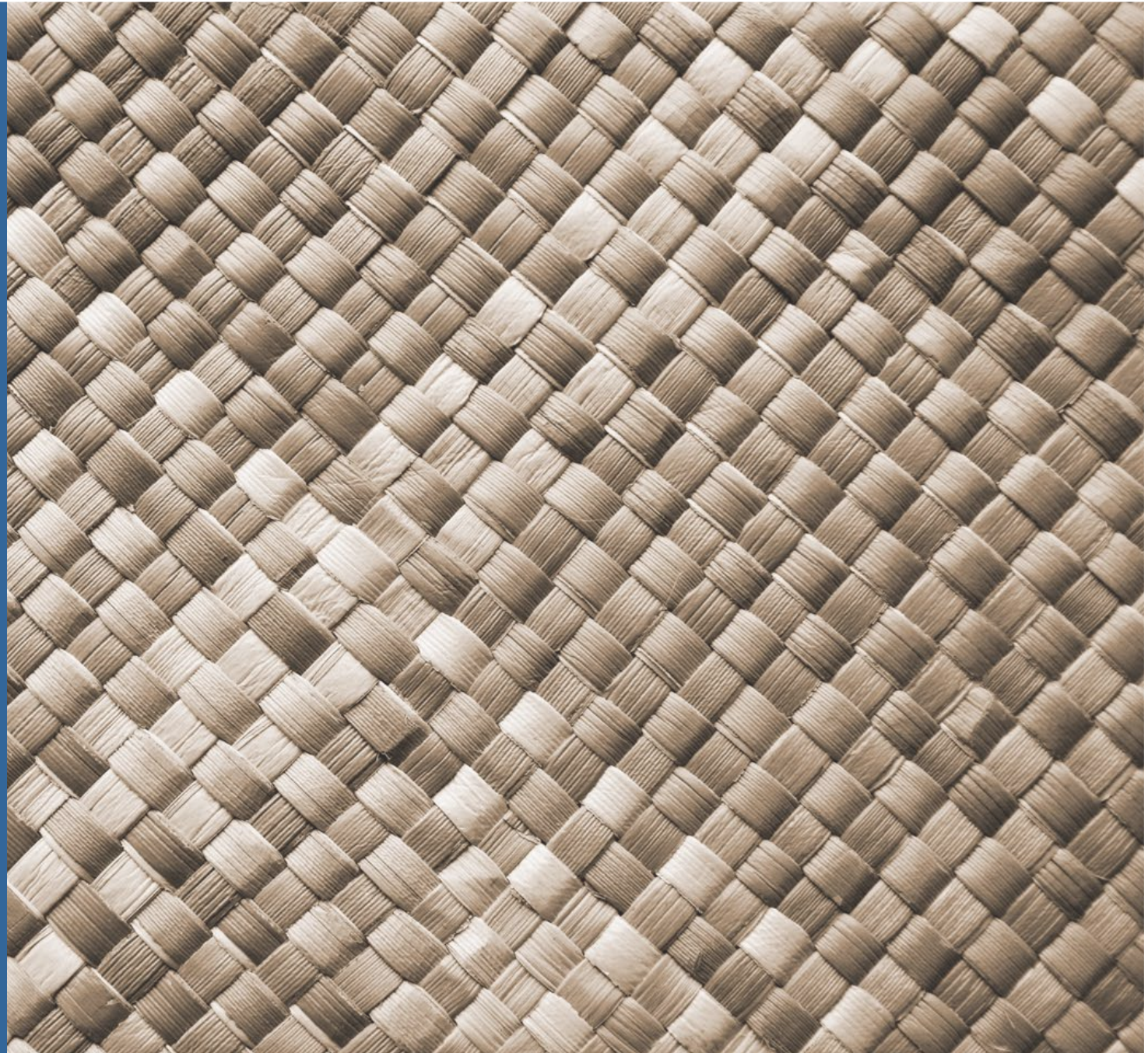
Abbreviations used in charts

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

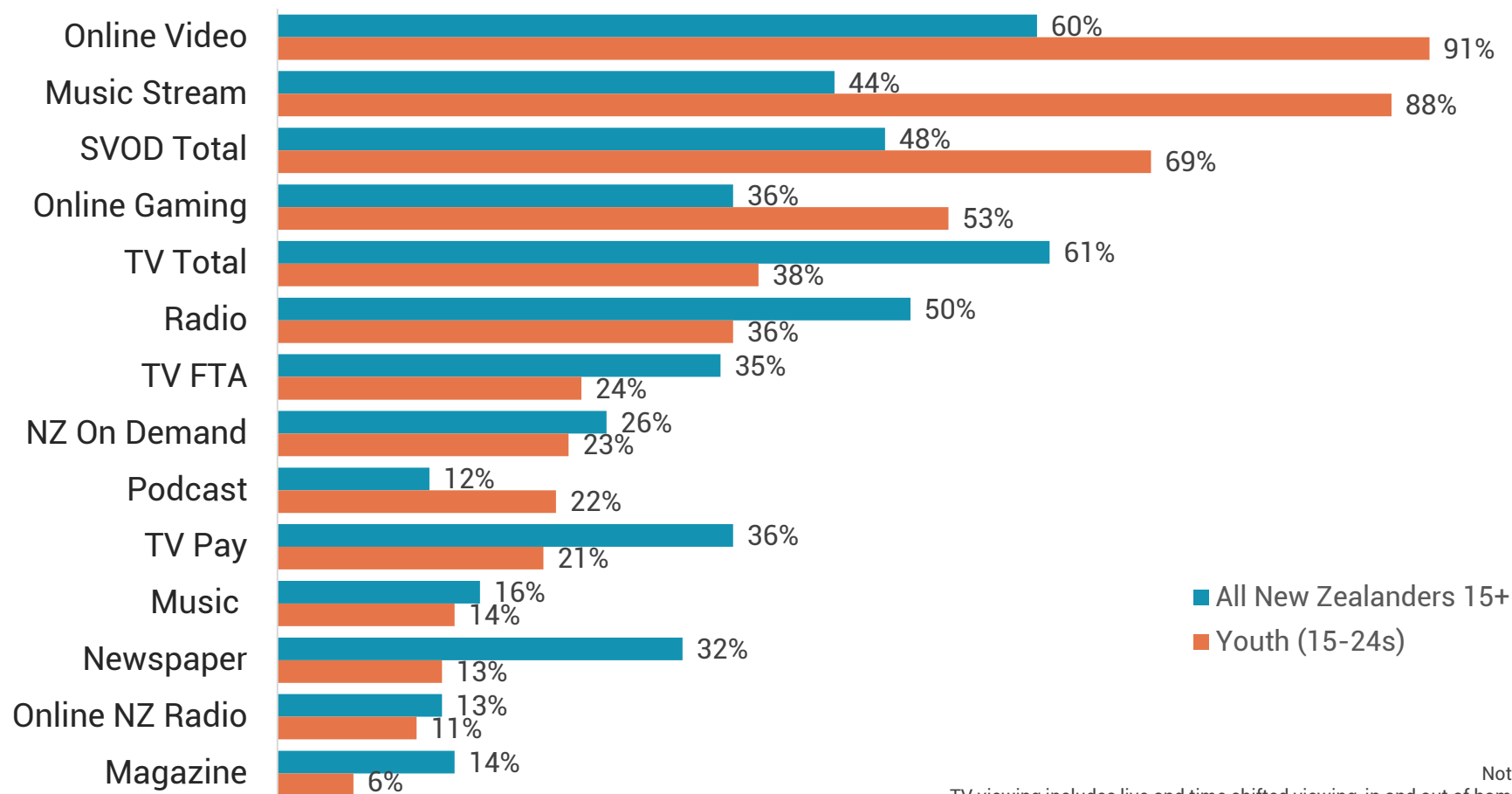


- Digital media overtook traditional media among 15-24s at least four years ago. This group exhibit very different daily media behaviour to overall New Zealanders 15+.
- The gap between digital and traditional media continues to widen, with increasing numbers of this group using most types of digital media each day, and doing so for longer.
 - And fewer are using traditional media each day, and those that do are using it for less time.
- There are no signs these trends are slowing down.
- Therefore the most popular sites, channels and stations are predominantly digital and most are international providers.
 - TVNZ 1 is the most popular NZ provider but this channel only reaches one in five 15-24s each day.
- The devices and services that 15-24s have access to enable their heavy digital media use, but the high incidence of these devices and services also draws a very different picture of a typical media consumer compared to overall New Zealanders.

Daily audience sizes in 2020. This chart shows the dominance of digital media in 15-24s' daily lives. Nearly all watch online video or listen to streamed music each day. Seven in ten watch SVOD, more than one in two play online gaming and one in five listen to a podcast. TV and radio are the most popular traditional media but reach fewer than four in ten 15-24s each day.

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



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.

Note:

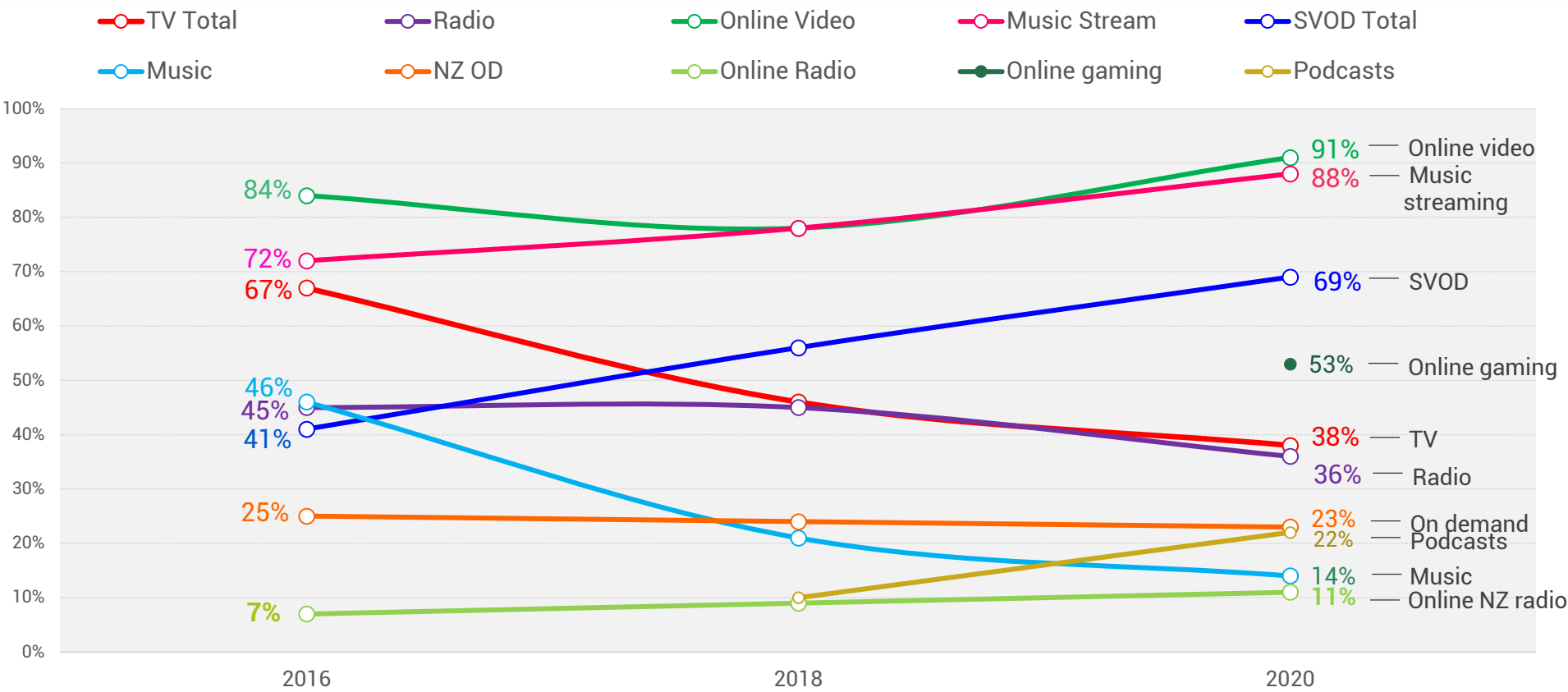
TV viewing includes live and time shifted viewing, in and out of home.

Daily audience sizes over time. 15-24s passed the cross-over point of digital and traditional media attracting the biggest audience some time ago and the gap continues to widen. Music streaming and SVOD continue to grow their daily audience among 15-24 year olds, while TV, radio and music (physical formats) continue to decline. On demand and online NZ radio are steady over time.



Daily reach of media over time – All 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.

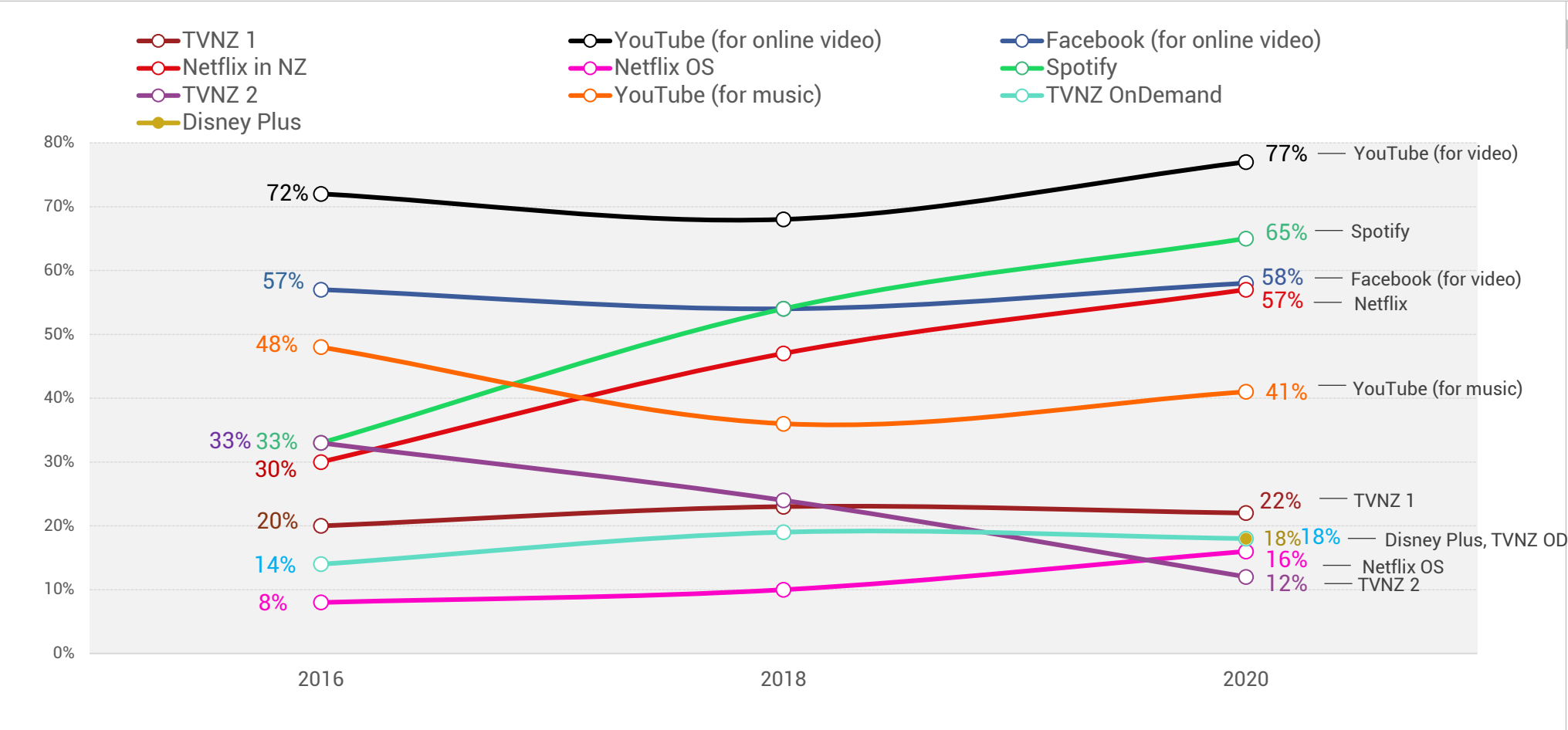
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

- Digital media now attracts the biggest daily audiences among 15-24s by a significant margin, and has done since at least 2018.
- The four most popular media among this age group are digital with nine in ten using online video or music streaming each day, seven in ten watching SVOD, and more than half playing online gaming.
- Conversely the daily reach of TV, radio and music on physical formats continues to decline among 15-24s – less than four in ten now watch TV or listen to the radio each day.
- These trends result in the top five most popular sites, channels and stations being digital (YouTube, Spotify, Facebook, Netflix), all with a substantially bigger audience than the most popular traditional media provider (TVNZ 1).
- Digital media also dominates the time 15-24s dedicate to media each day with this group spending nearly three hours a day watching SVOD or listening to streamed music, more than 2½ hours watching online video, and 1½ hours playing online gaming.
 - The most time youth dedicate to a traditional media is watching TV for 46 minutes per day.
- Time spent using digital media has continued to increase since 2018, while time using traditional media continues to decline.
- Not surprisingly 15-24s are more likely to have access to all the devices and services that enable digital media use.
 - More of this group now have access to Netflix than a TV. More have a games console than a radio, and nearly as many have access to Lightbox as SKY TV or a PVR..

Most popular channels, sites and stations 2020. YouTube (for video), Netflix and Spotify continue to increase their daily reach among 15-24s. There is now a gap between the top five digital providers and the other top sites, channels or stations among 15-24s. TVNZ 1 is the most popular traditional media provider and is stable, while TVNZ 2 continues to decline.

Most popular channels, sites & stations – all 15-24s.

Q: Which of the following did you use yesterday?



- Next seven:
- NZ Herald (video) 10%
 - Three 9%
 - Stuff (video) 9%
 - Mai FM 8%
 - ZM 8%
 - Amazon Prime 7%
 - Apple Music 7%



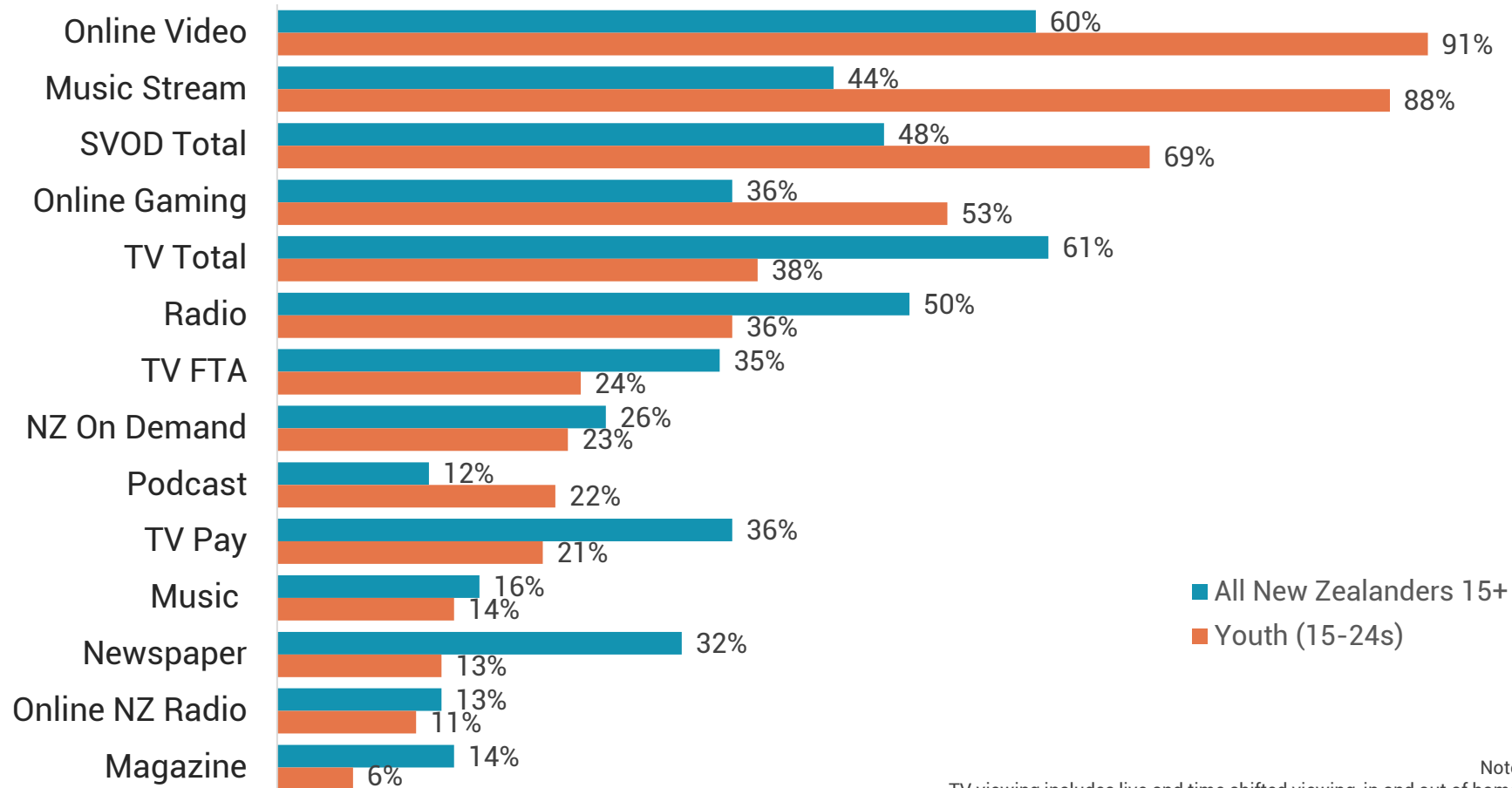
Daily Media Consumption



This chart shows the dominance of digital media in 15-24s' daily lives. Nearly all watch online video or listen to streamed music each day. Seven in ten watch SVOD, more than one in two play online gaming and one in five listen to a podcast. TV and radio are the most popular traditional media but reach fewer than four in ten 15-24s each day.

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



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.

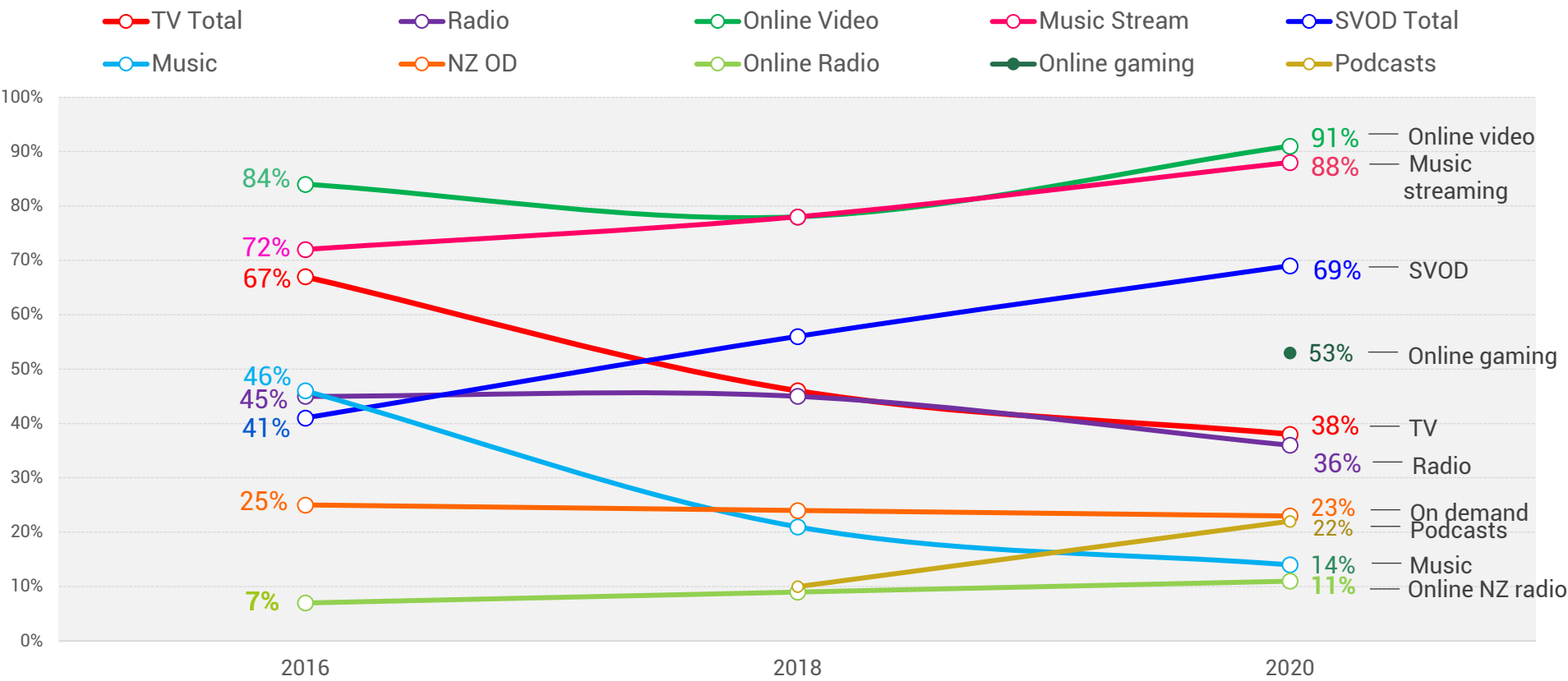
Note:
TV viewing includes live and time shifted viewing, in and out of home.

15-24s passed the cross-over point of digital and traditional media attracting the biggest audience some time ago and the gap continues to widen. Music streaming and SVOD continue to grow their daily audience among 15-24 year olds, while TV, radio and music (physical formats) continue to decline. On demand and online NZ radio are steady over time.



Daily reach of media over time – All 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.

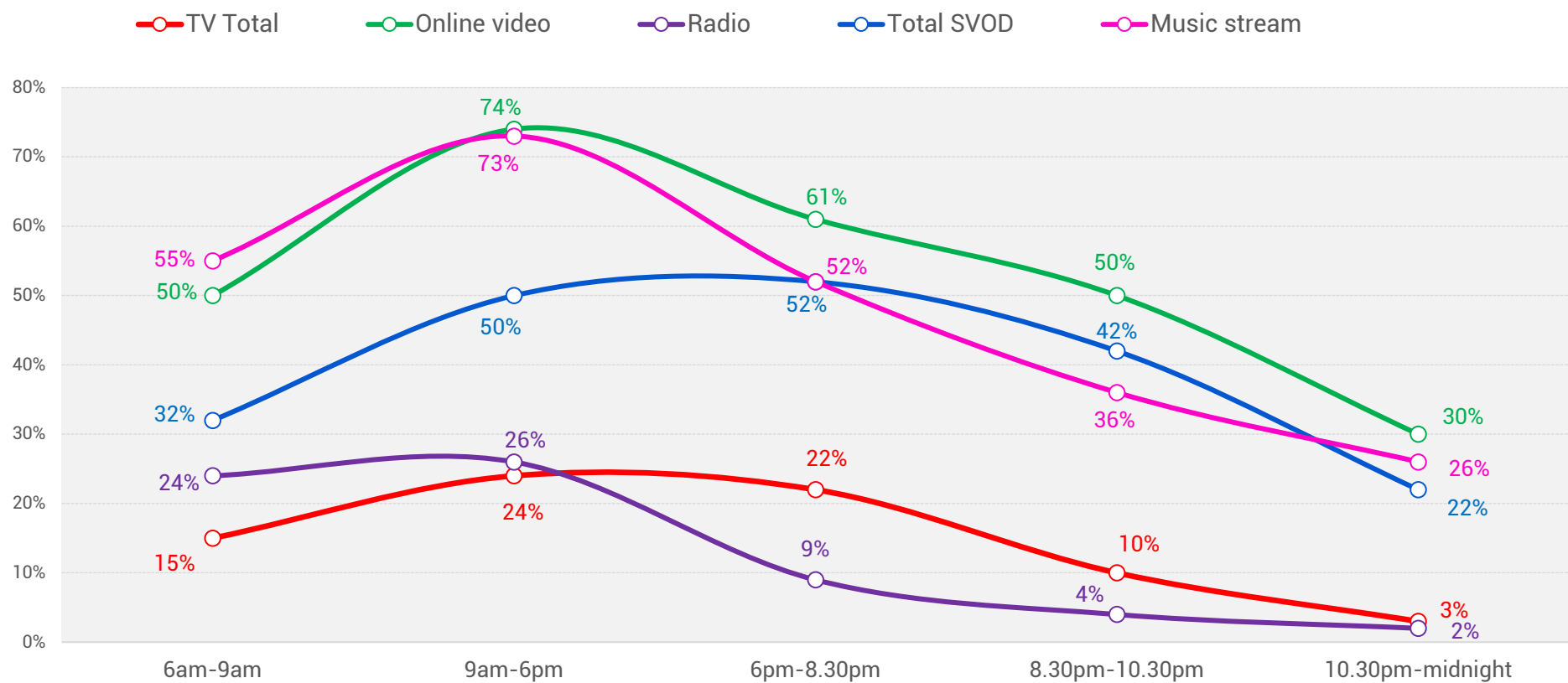
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

The way 15-24s consume media changes only slightly over the day. Online video is most popular throughout the day, with music streaming second most popular for most of the day until SVOD attracts a slightly bigger audience in the evening. The reach of TV or radio does not exceed one in four 15-24s during any period of the day.



Reach of media over the day 2020 – all 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.

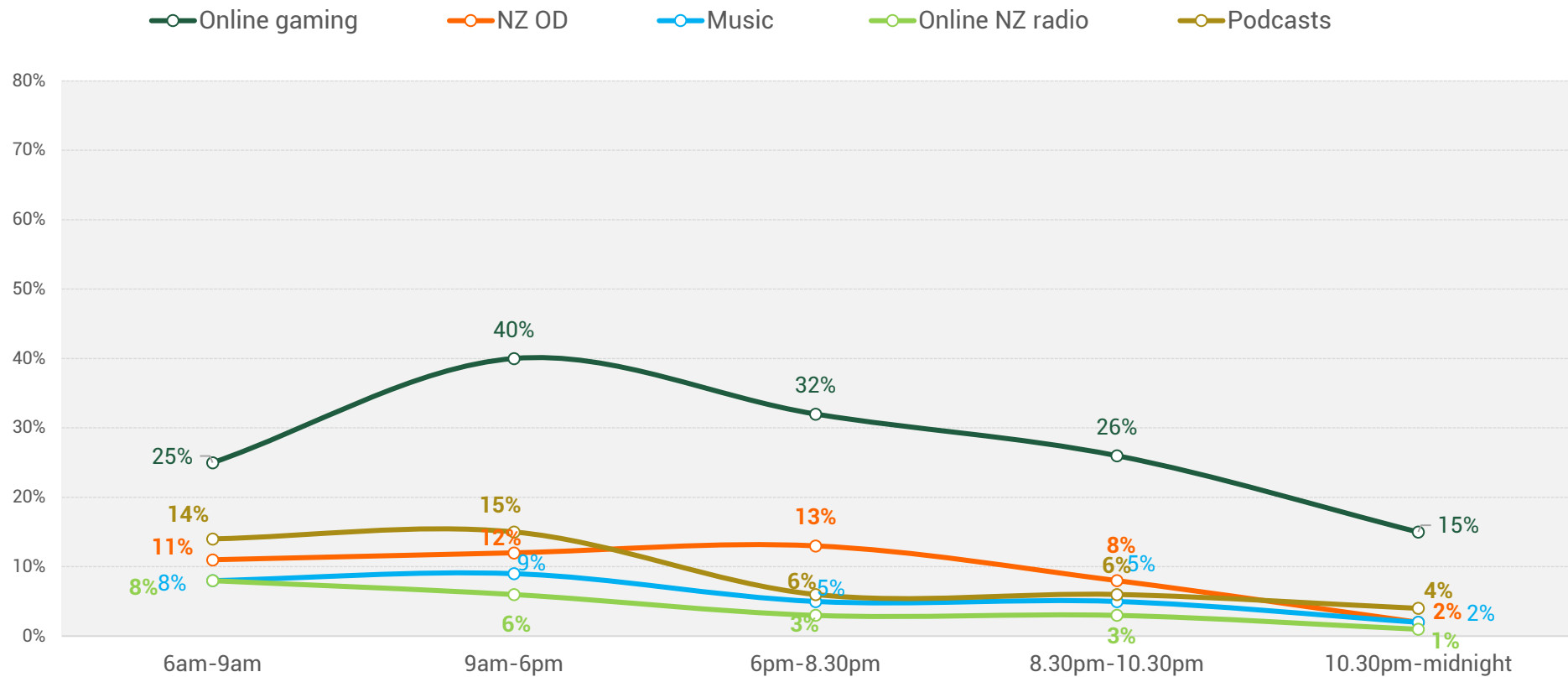


Online gaming attracts larger audiences than TV and radio throughout the day. Podcasts are most popular in the morning and during the day.



Reach of media over the day 2020 – all 15-24s.

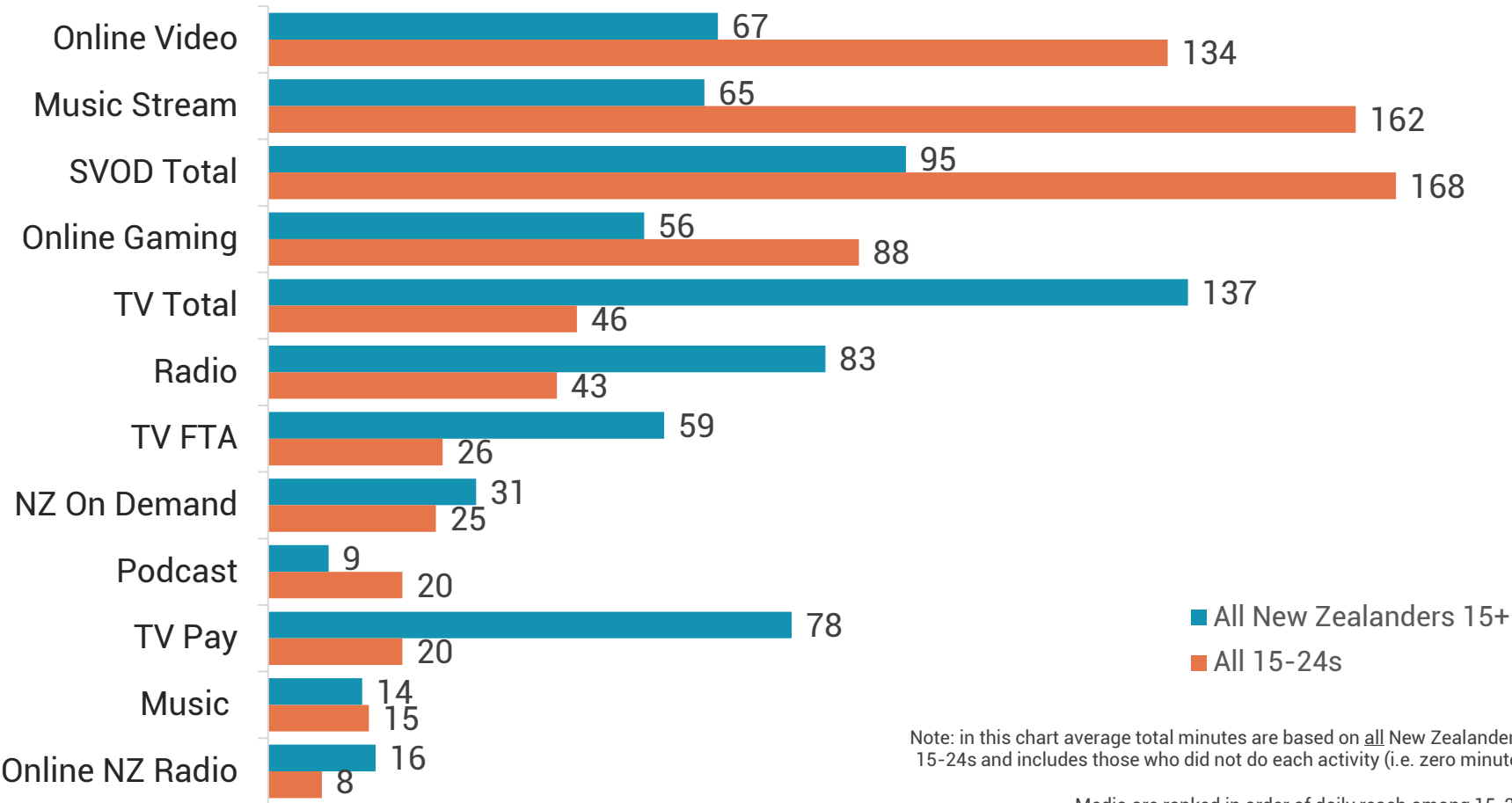
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Digital media not only attracts the biggest audiences among 15-24s, but this age group also dedicate the most time to these media each day. 15-24s spend an average of more than 2½ hours watching SVOD or listening to streamed music, and more than two hours watching online video each day.

Time spent consuming media 2020 – average minutes per day. All New Zealanders 15+ and all 15-24s.

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



The traditional media that 15-24s dedicate the most time to is TV, but this is just 46 minutes on average.

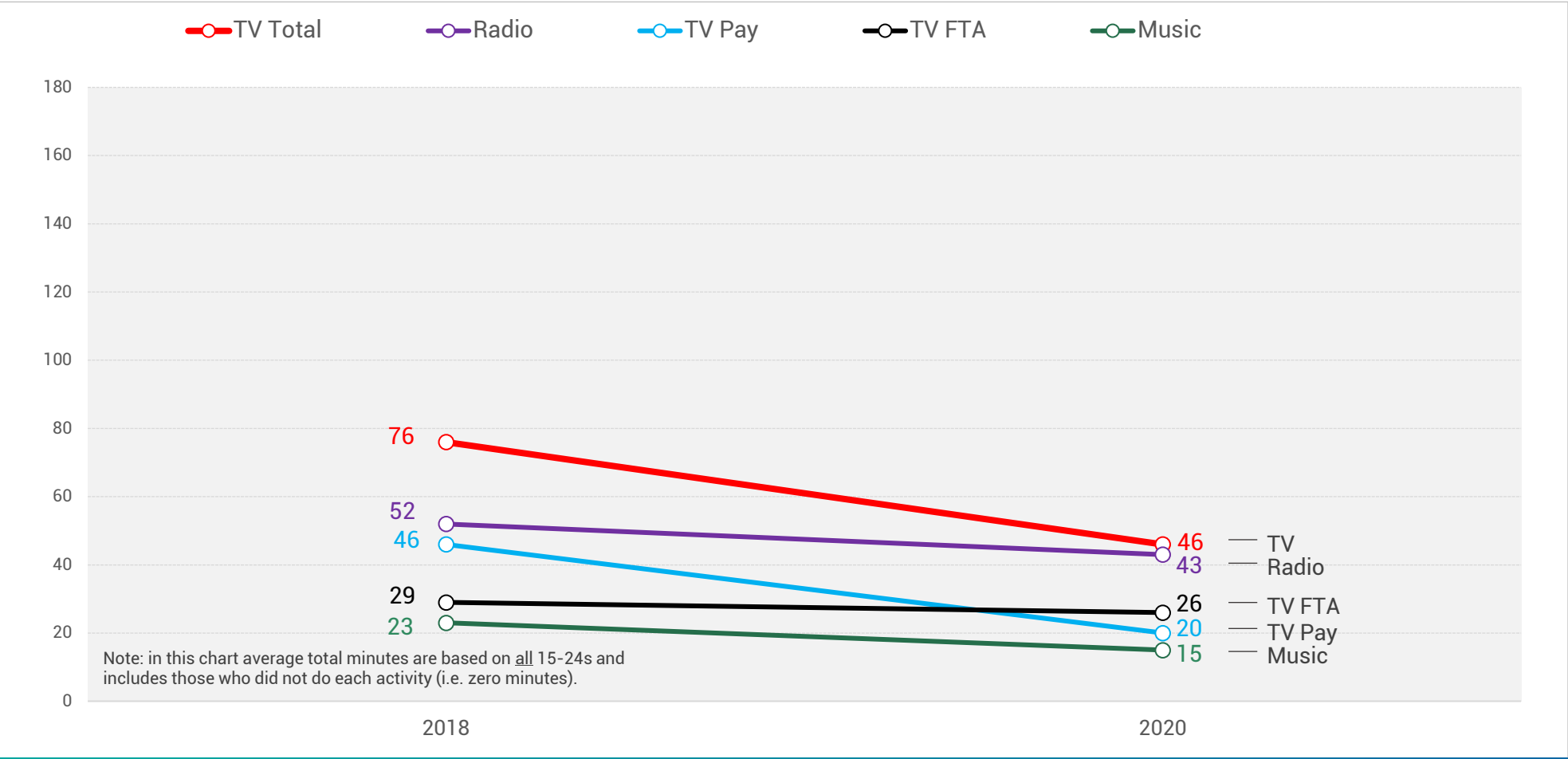
Note: in this chart average total minutes are based on all New Zealanders & 15-24s and includes those who did not do each activity (i.e. zero minutes).

Media are ranked in order of daily reach among 15-24s.

Time spent using all traditional media has declined since 2018 with the exception of TV viewing via a FTA platform.

Time spent consuming traditional media over time – average minutes per day. All 15-24s.

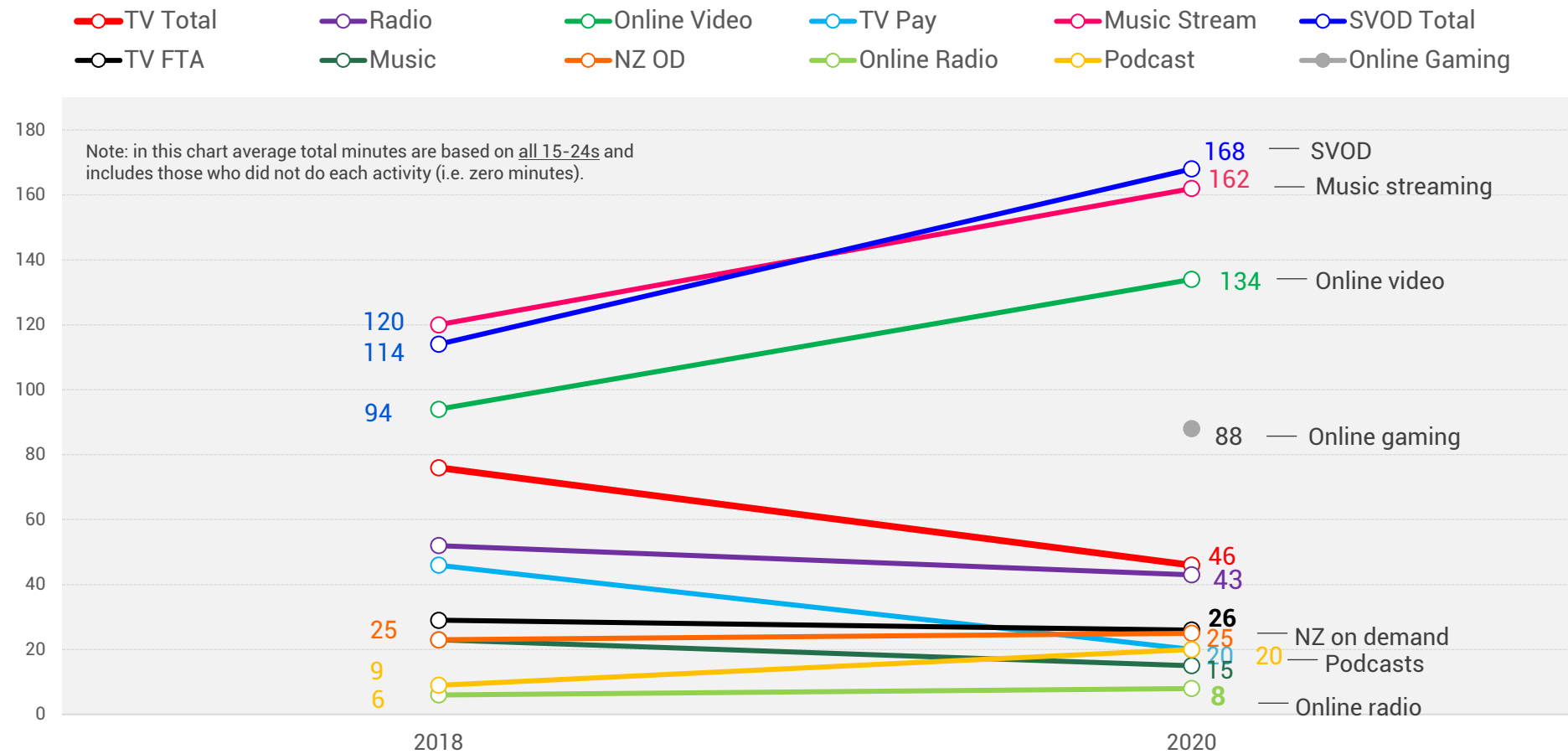
Q: Between (TIME PERIOD) about how long did you do (activity) for?



Conversely the amount of time 15-24s dedicate to watching SVOD, online video and listening to streamed music each day has increased significantly since 2018.

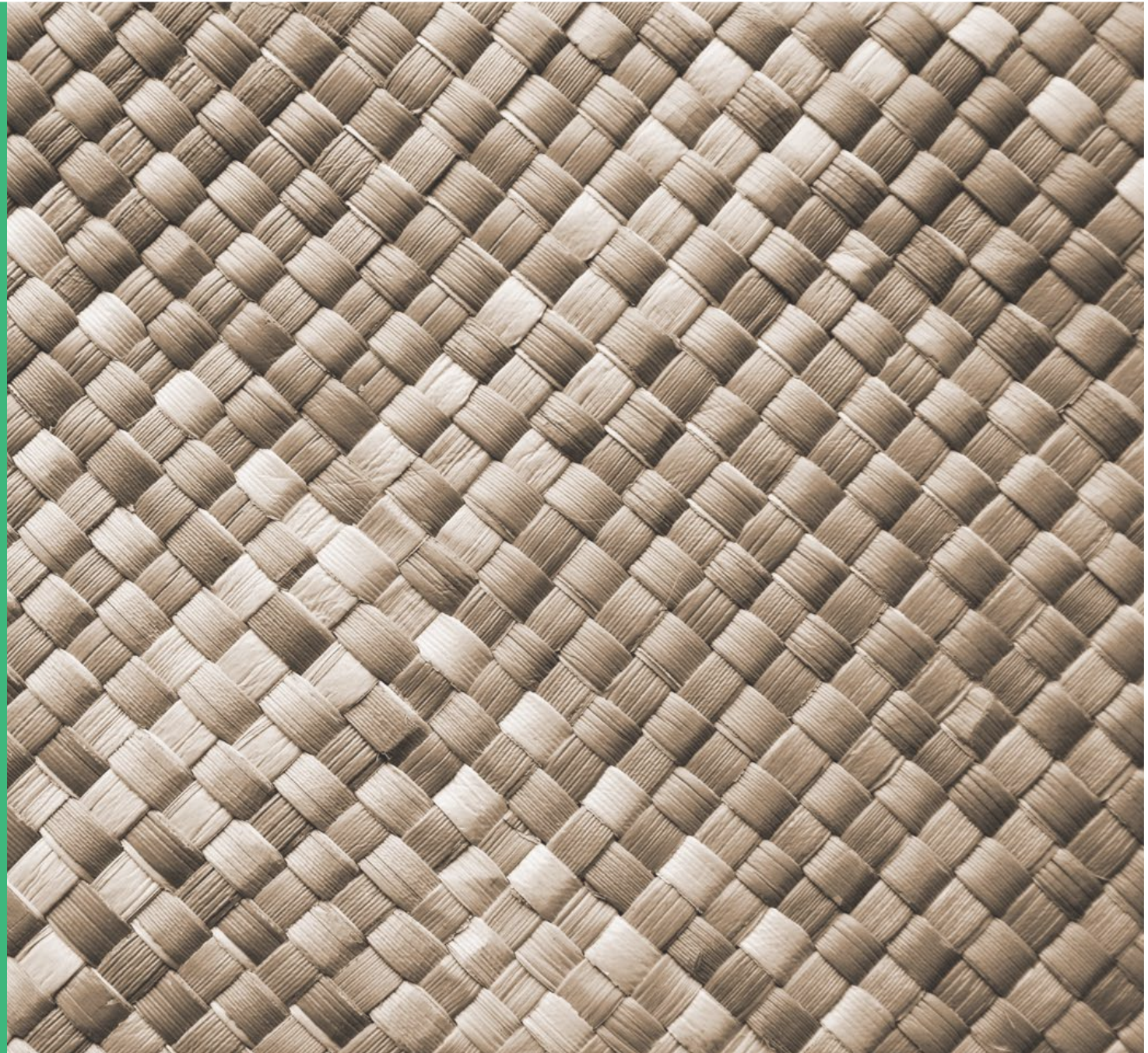
Time spent consuming all media over time – average minutes per day. All 15-24s.

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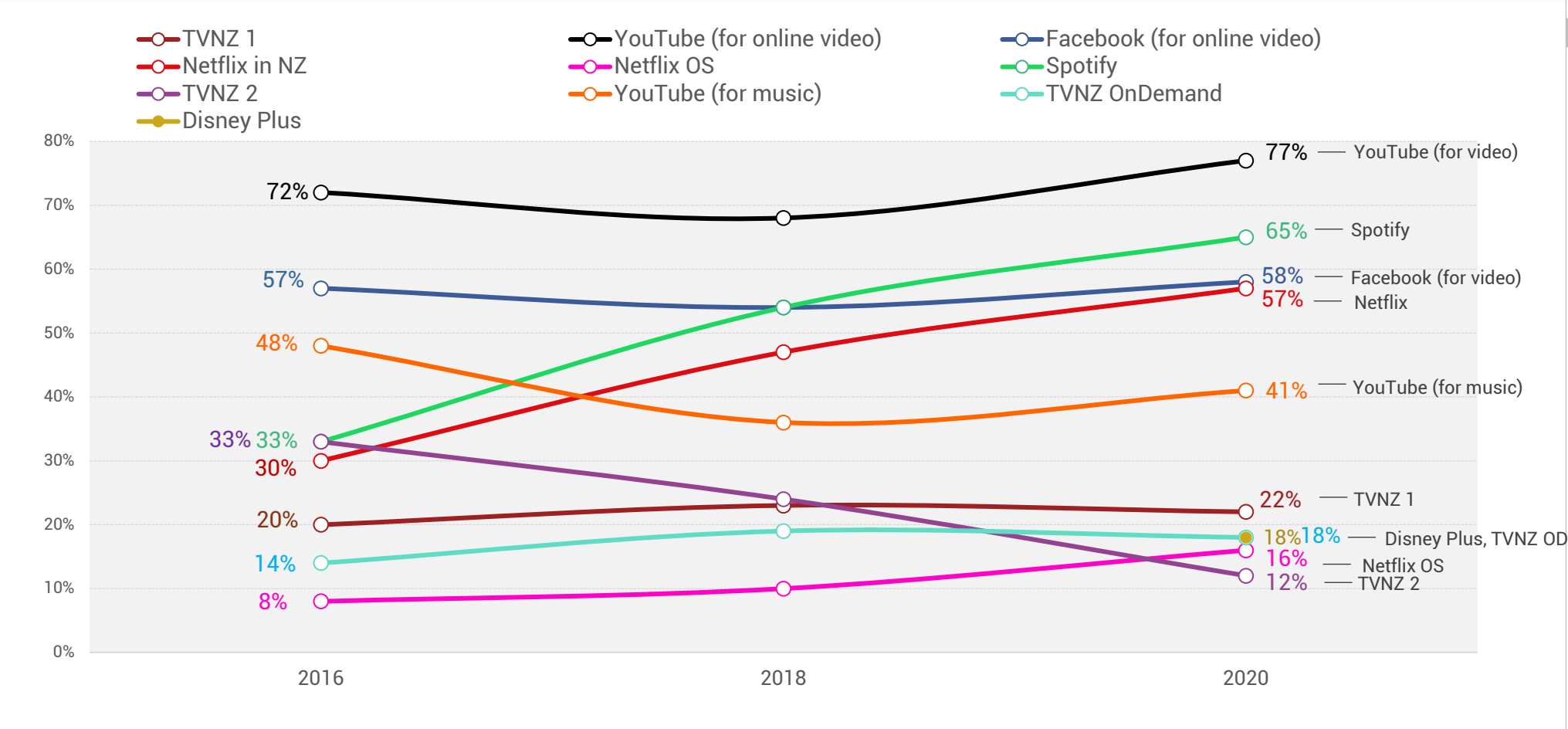
Daily Media Consumption By Channel, Site & Station



YouTube (for video), Netflix and Spotify continue to increase their daily reach among 15-24s. There is now a gap between the top five digital providers and the other top sites, channels or stations among 15-24s. TVNZ 1 is the most popular traditional media provider and is stable, while TVNZ 2 continues to decline.

Most popular channels, sites & stations – all 15-24s.

Q: Which of the following did you use yesterday?

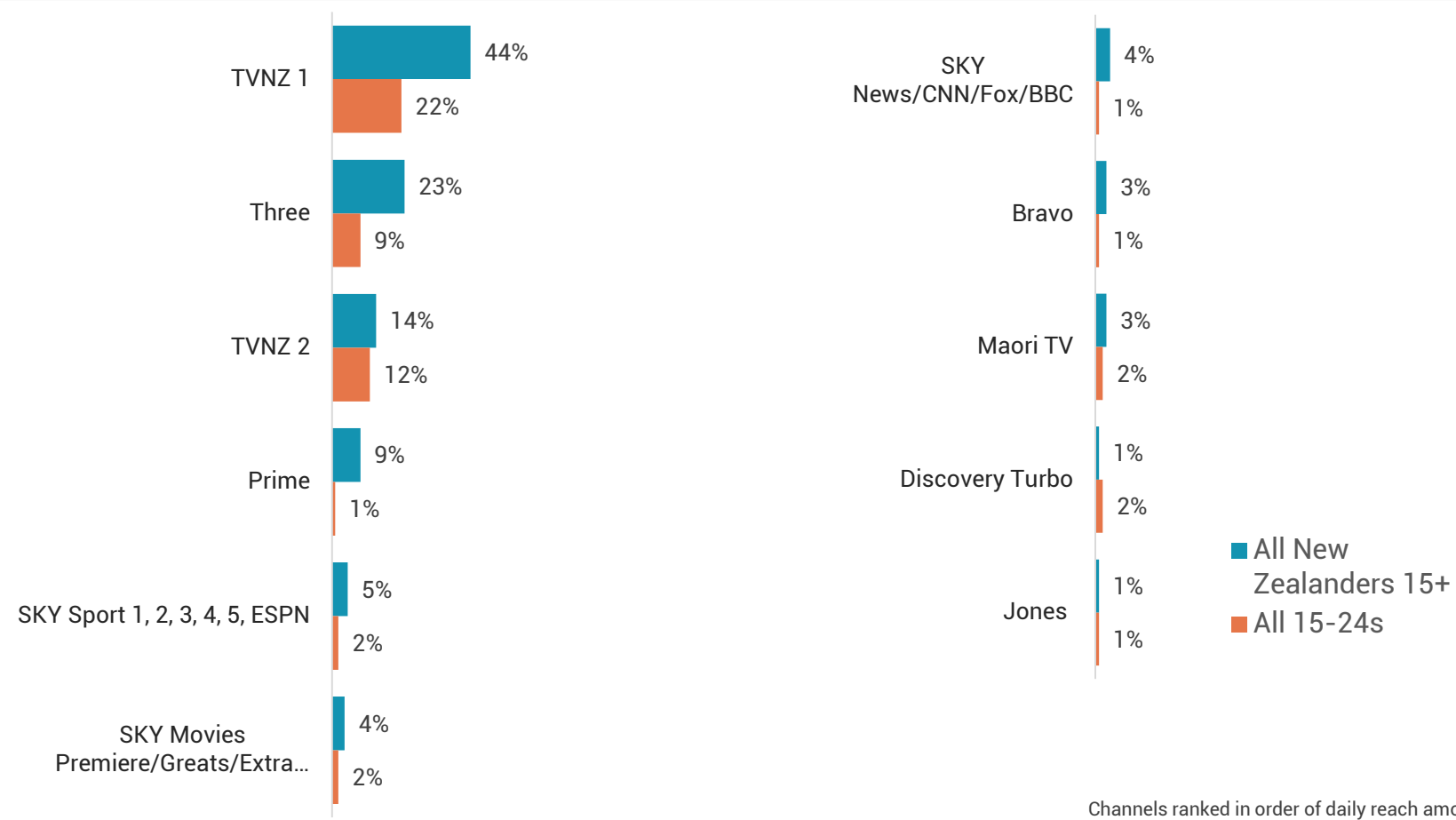


- Next seven:
- NZ Herald (video) 10%
 - Three 9%
 - Stuff (video) 9%
 - Mai FM 8%
 - ZM 8%
 - Amazon Prime 7%
 - Apple Music 7%

15-24s demonstrate a very limited repertoire of TV channels and are less likely to watch all channels except TVNZ 2.

Daily reach of TV channels 2020 – all New Zealanders 15+ & all 15-24s.

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

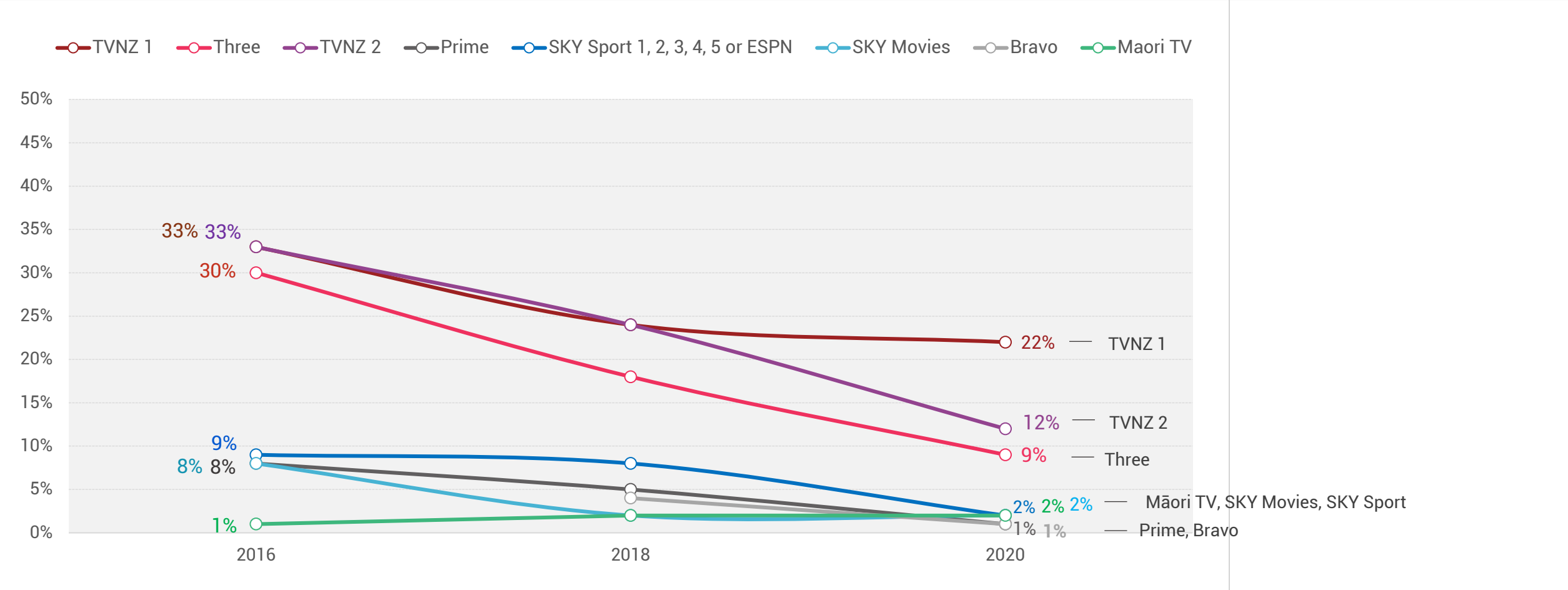


Note:
Channels ranked in order of daily reach among all New Zealanders.

The daily audience of nearly all TV channels has declined among 15-24s since 2018. The exception is TVNZ 1 which may have benefited from youth tuning in to the daily Covid 19 updates. SKY Sport's sharp decline since 2018 may be a result of the absence of live sport during the survey period.

Daily reach of TV channels (6% reach and over) – all 15-24s.

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

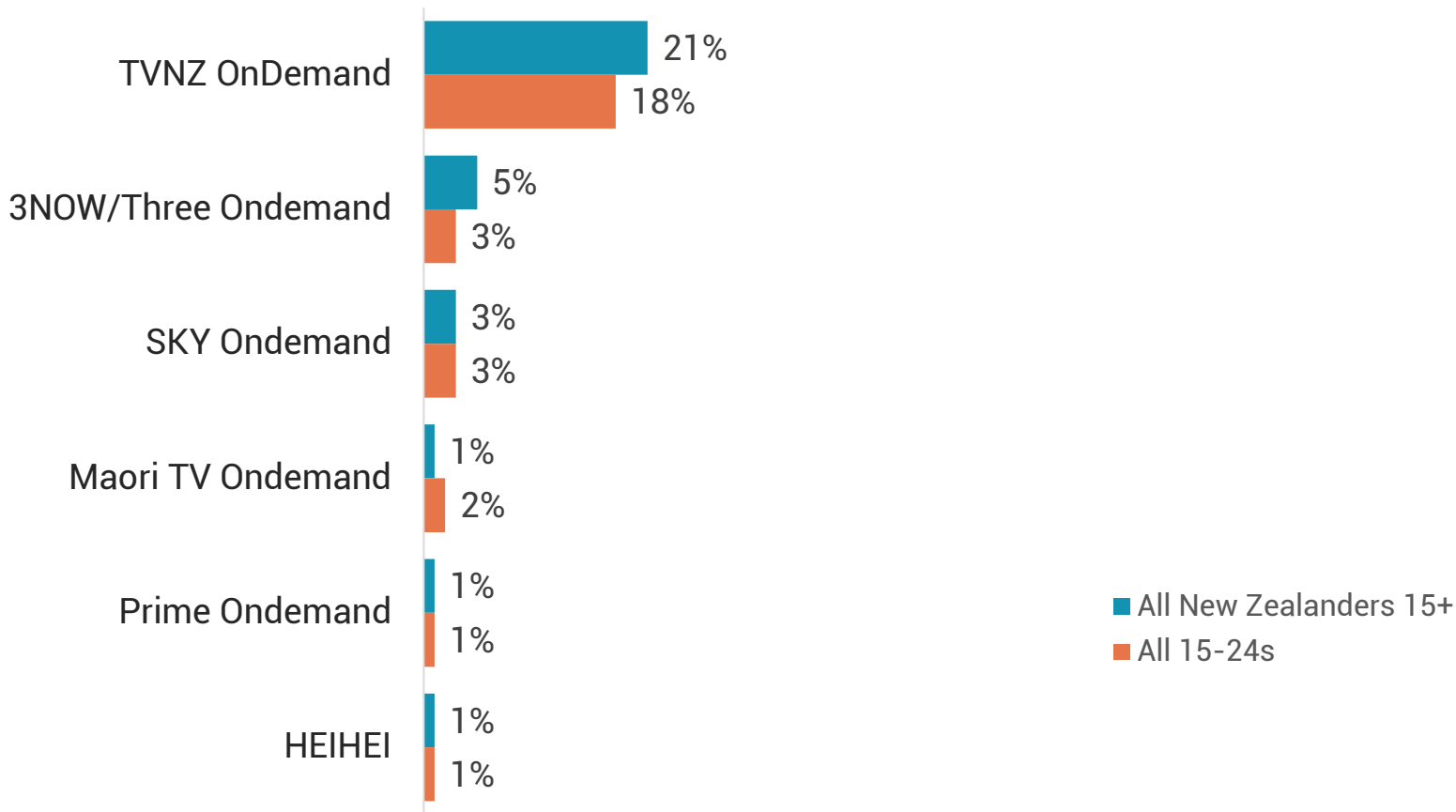


TVNZ OnDemand is the most popular on demand site among 15-24s, attracting nearly one in five of this group each day.



Daily reach of on demand sites 2020 – All New Zealanders 15+ & all 15-24s.

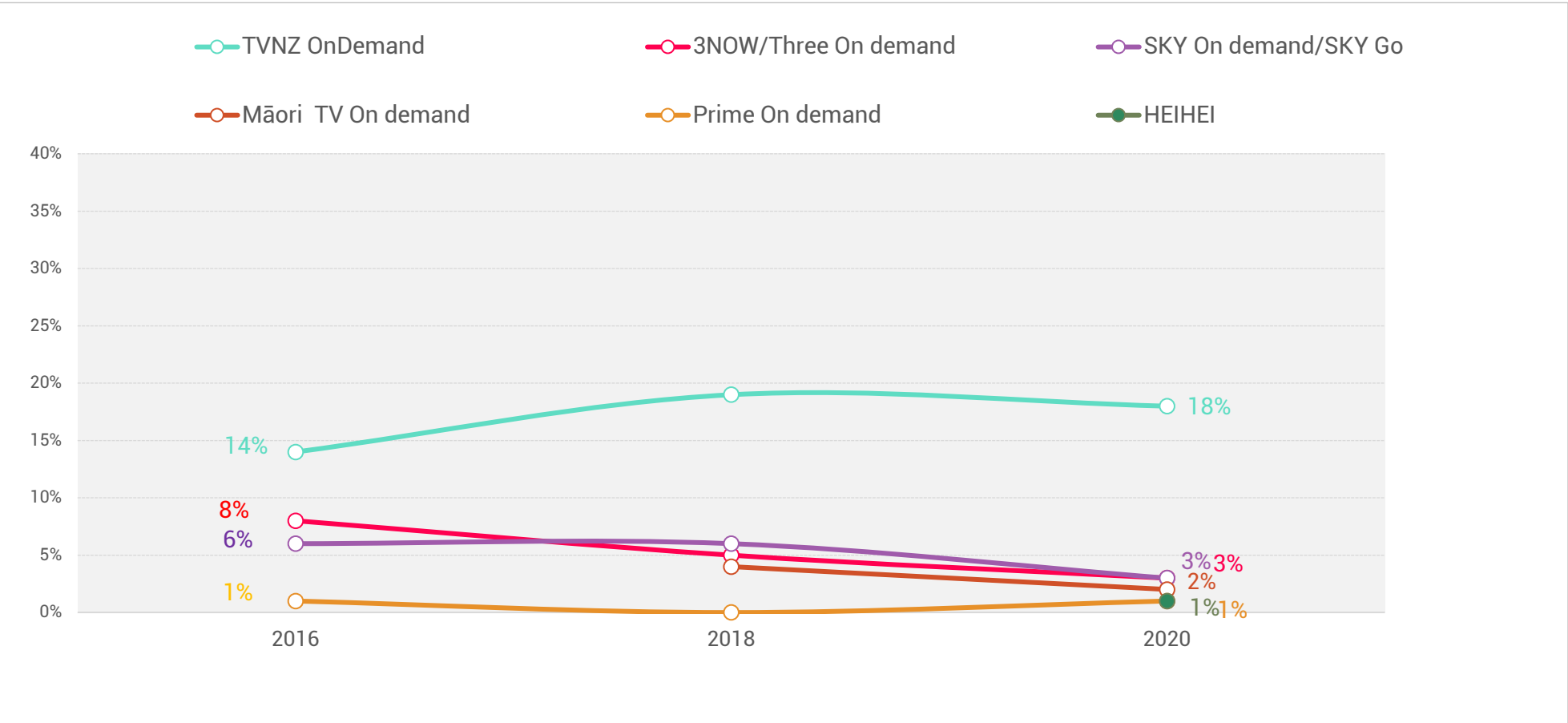
Q: Thinking about yesterday overall, which of the following websites did you watch?



No on demand site has grown its daily audience among 15-24s since 2018.

Daily reach of on demand sites – all 15-24s.

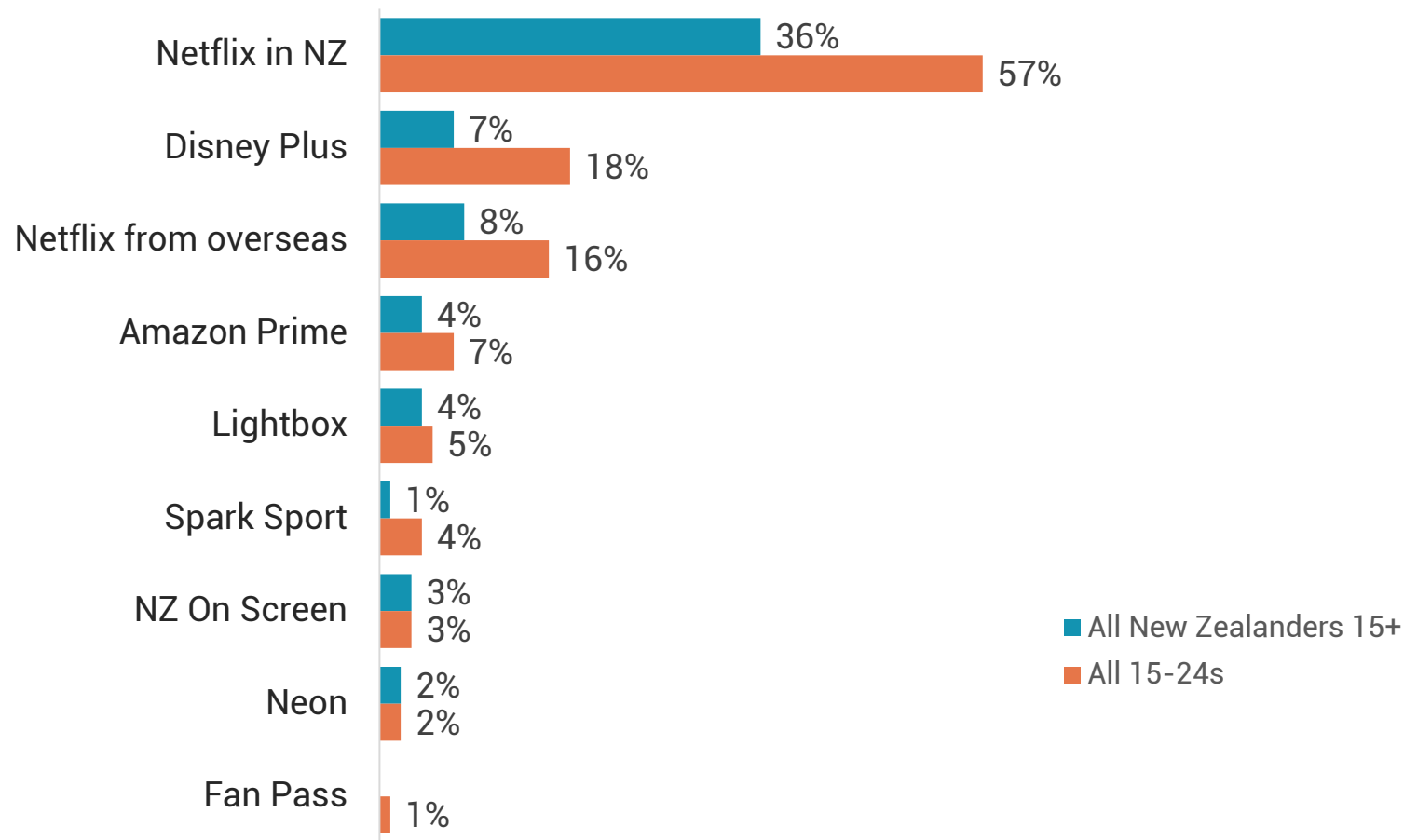
Q: Thinking about yesterday overall, which of the following websites did you watch?



Nearly six in ten 15-24s watch Netflix each day – significantly more than the one third of New Zealanders 15+ who do the same. Reflecting the popularity of SVOD overall, 15-24s are more likely to watch nearly every SVOD provider more than average.

Daily reach of SVOD sites 2020 – All New Zealanders 15+ & all 15-24s.

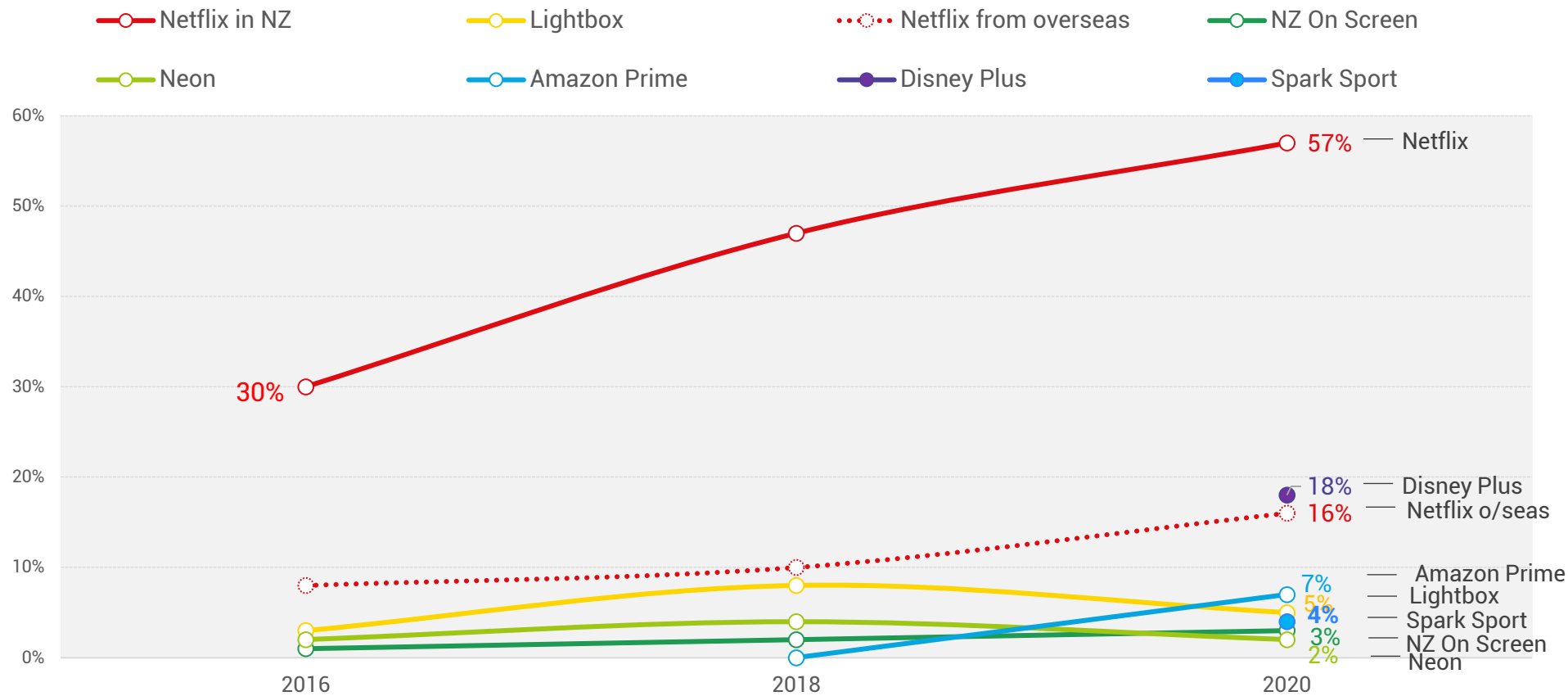
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Netflix has continued to grow its daily audience among 15-24s – nearly doubling since 2016. Amazon Prime also shows significant growth and Disney Plus reaches one in five 15-24s each day.

Daily reach of SVOD sites – all 15-24s.

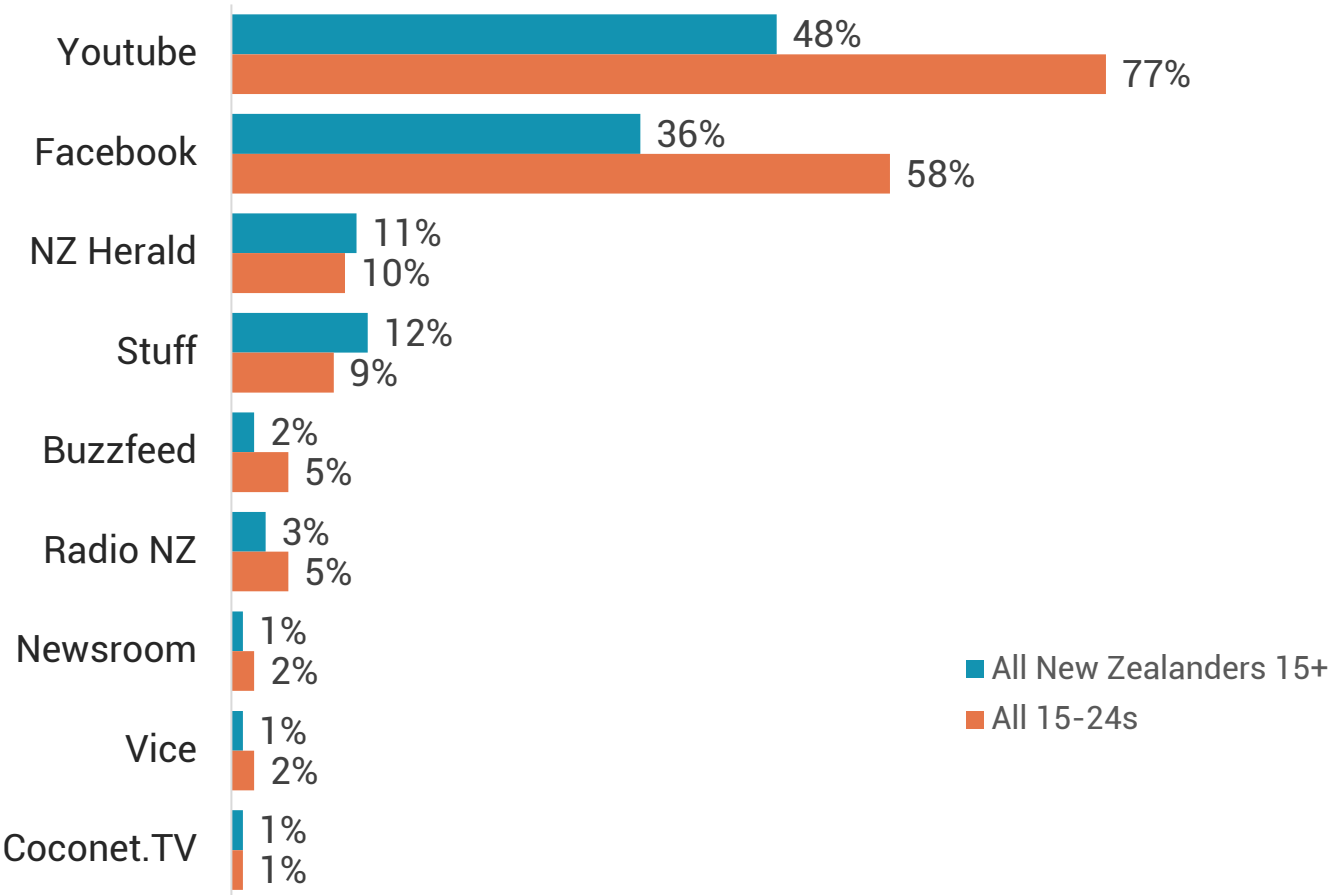
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



15-24s are nearly twice as likely to watch online video on YouTube or Facebook than overall New Zealanders 15+. There is less difference in behaviour in terms of using other online video sites compared to all New Zealanders 15+.

Daily reach of online video sites 2020 – All New Zealanders 15+ & all 15-24s.

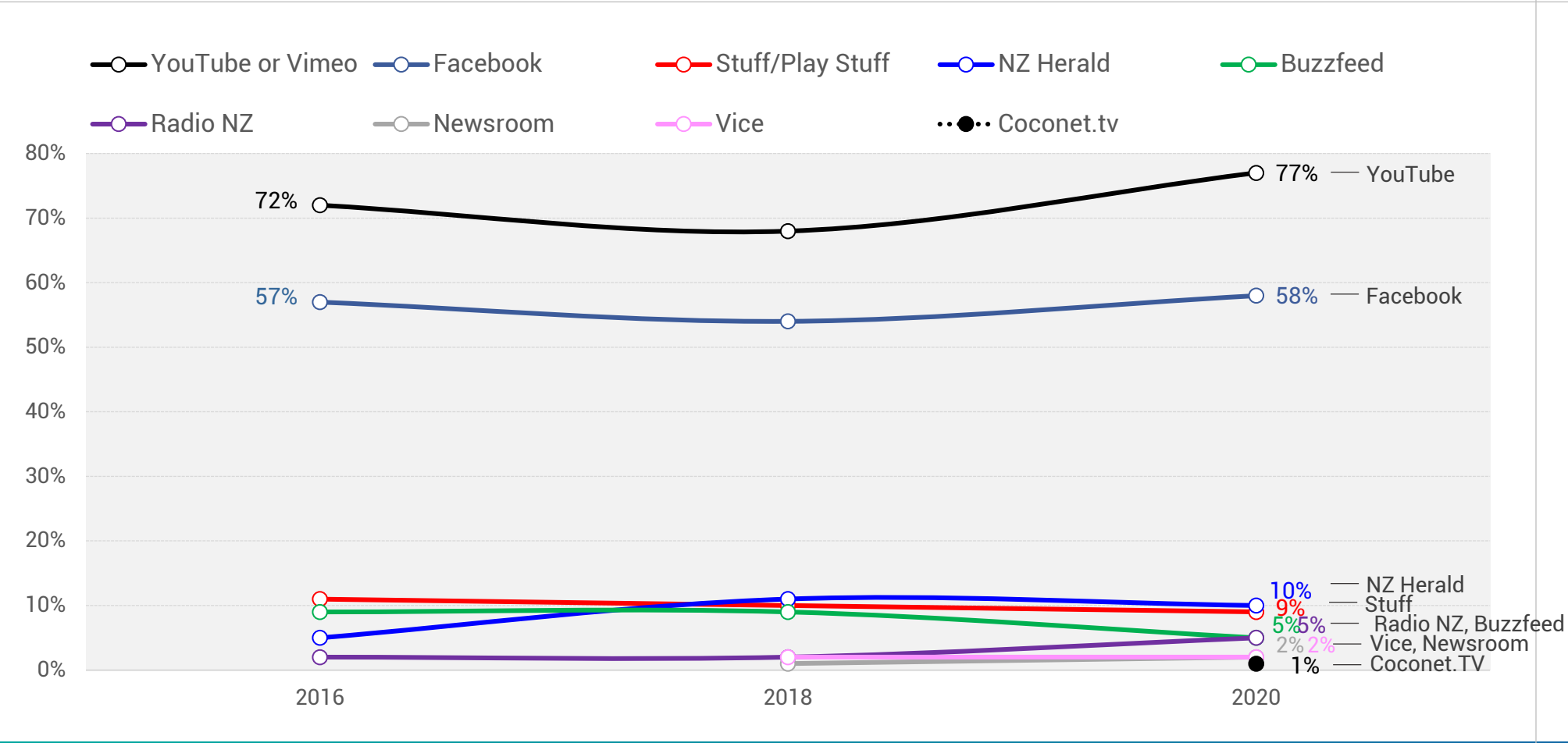
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



While YouTube's daily audience among 15-24s has grown slightly since 2018, overall daily audiences of online video sites are relatively stable with no sites showing significant growth or decline since 2016.

Daily reach of online video sites – all 15-24s.

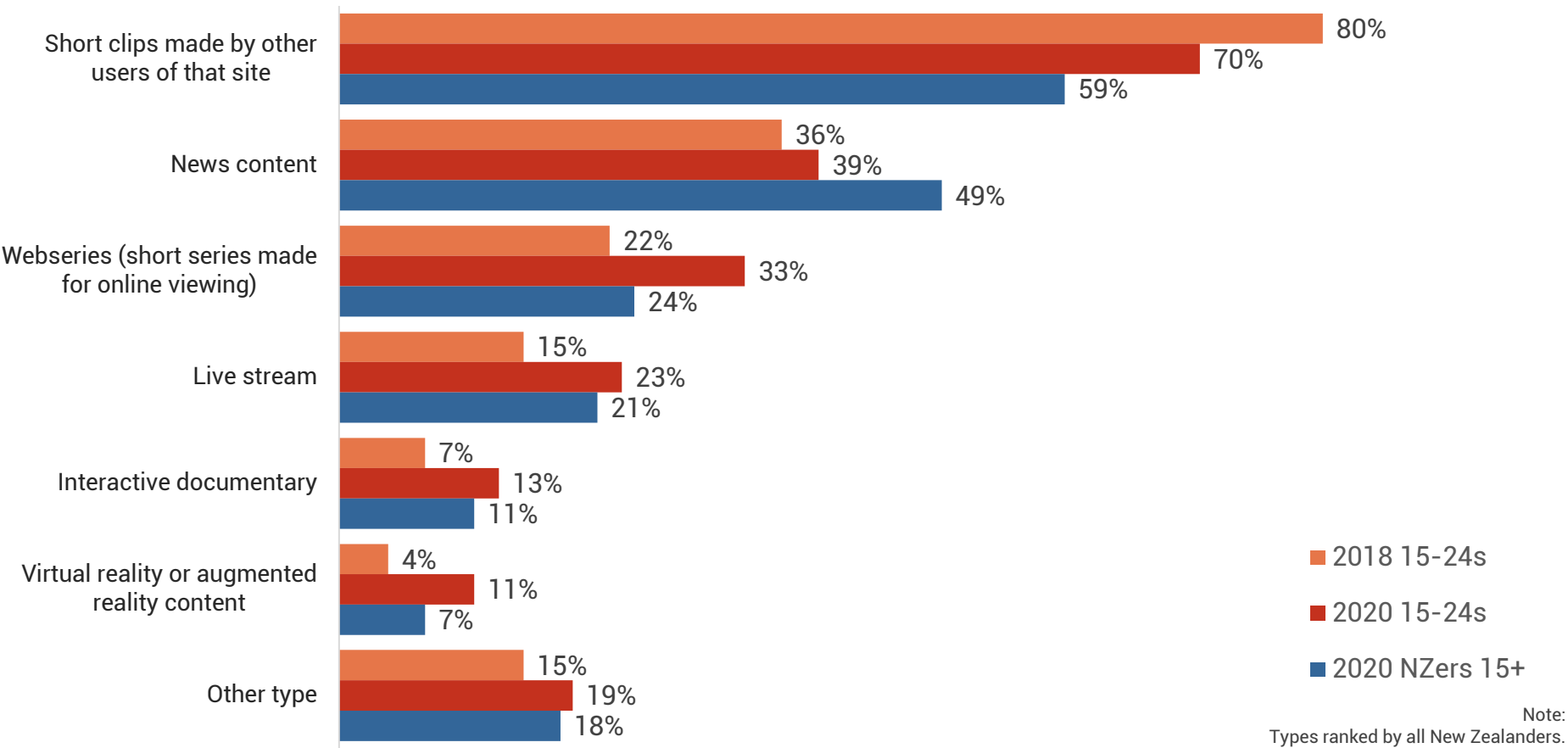
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



15-24s are significantly more likely to watch short user generated clips than average though this audience has declined since 2018. Youth are less likely to watch news content than all New Zealanders 15+. Since 2018 the proportion of 15-24s who watch webseries, live streams or virtual/augmented reality has increased significantly.

Types of online video watched – all 15-24s who watched online video yesterday

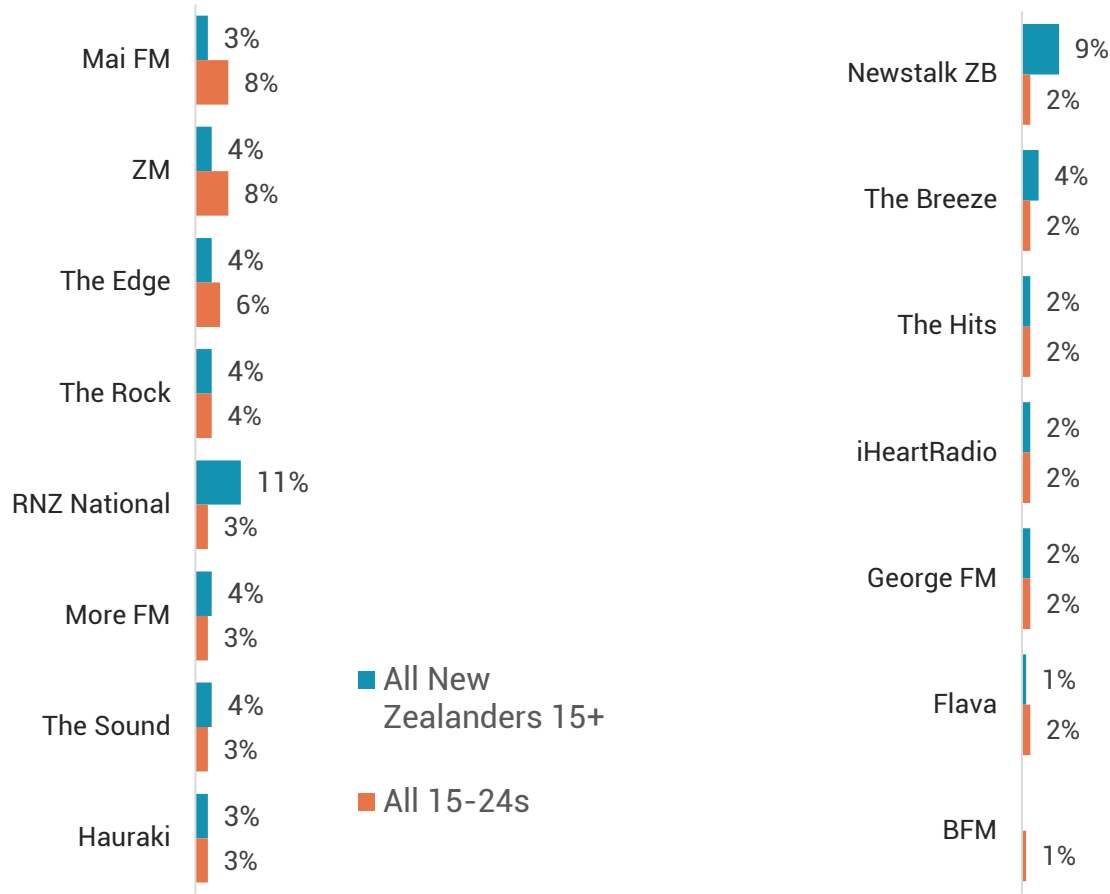
Q: Which of the following types of video did you watch on these sites?



15-24s are less likely to listen to the radio overall, so the daily reach of individual stations is low. However this age group are more likely than average to listen to Mai FM and ZM.

Daily reach of radio stations 2020 (stations 2% and above) – all New Zealanders 15+ and all 15-24s.

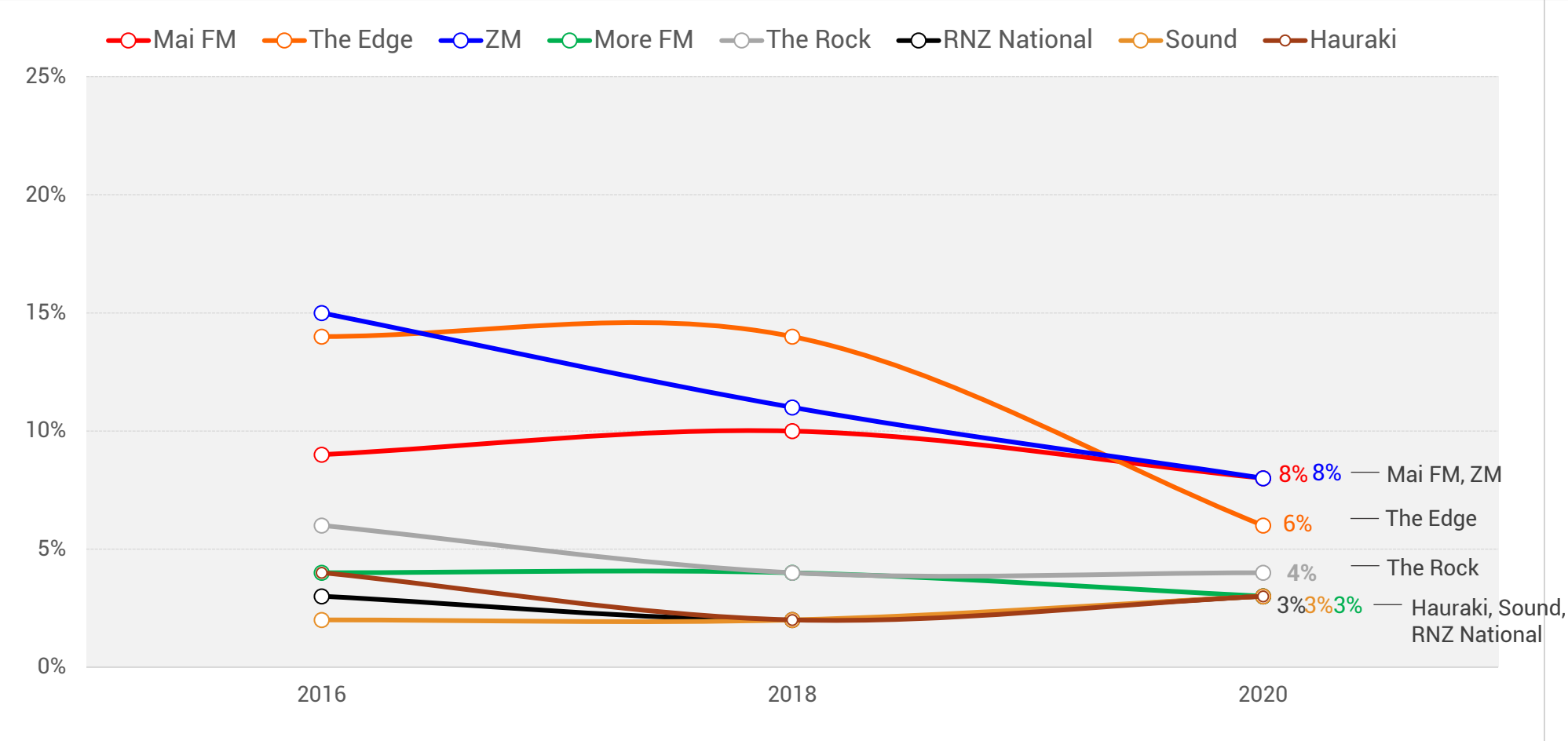
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



The daily audiences on the most popular radio stations are either stable or have significantly declined since 2018. In particular the number of 15-24s listening to The Edge each day has decreased significantly.

Daily reach of radio stations over time (3% reach and above) – all 15-24s.

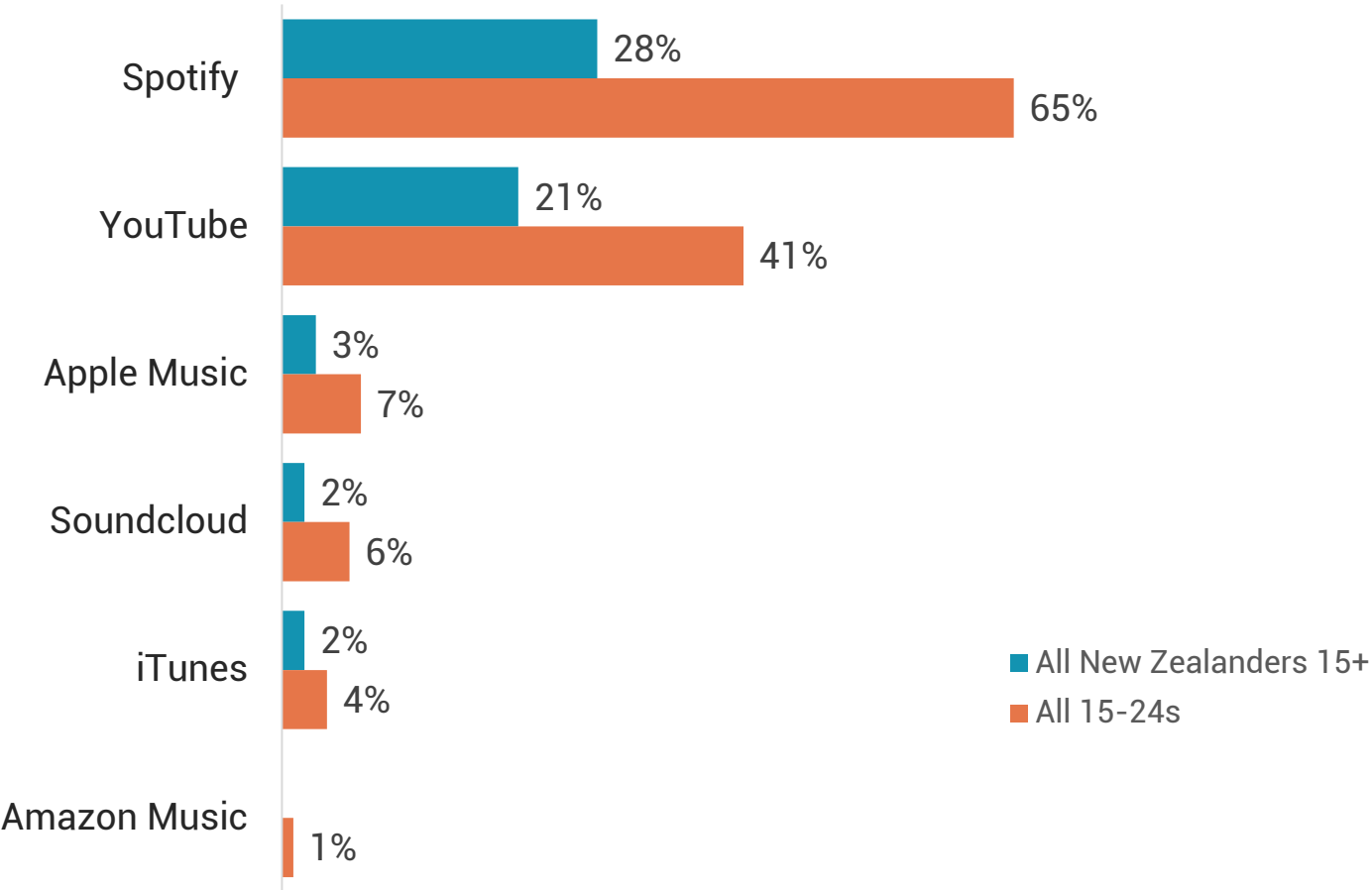
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



15-24s are more likely to listen to all the main providers of music streaming, with Spotify easily the most popular over YouTube. However even among this age group there are several providers who failed to register a daily audience in this study.

Daily reach of music streaming sites 2020 – All New Zealanders 15+ & all 15-24s.

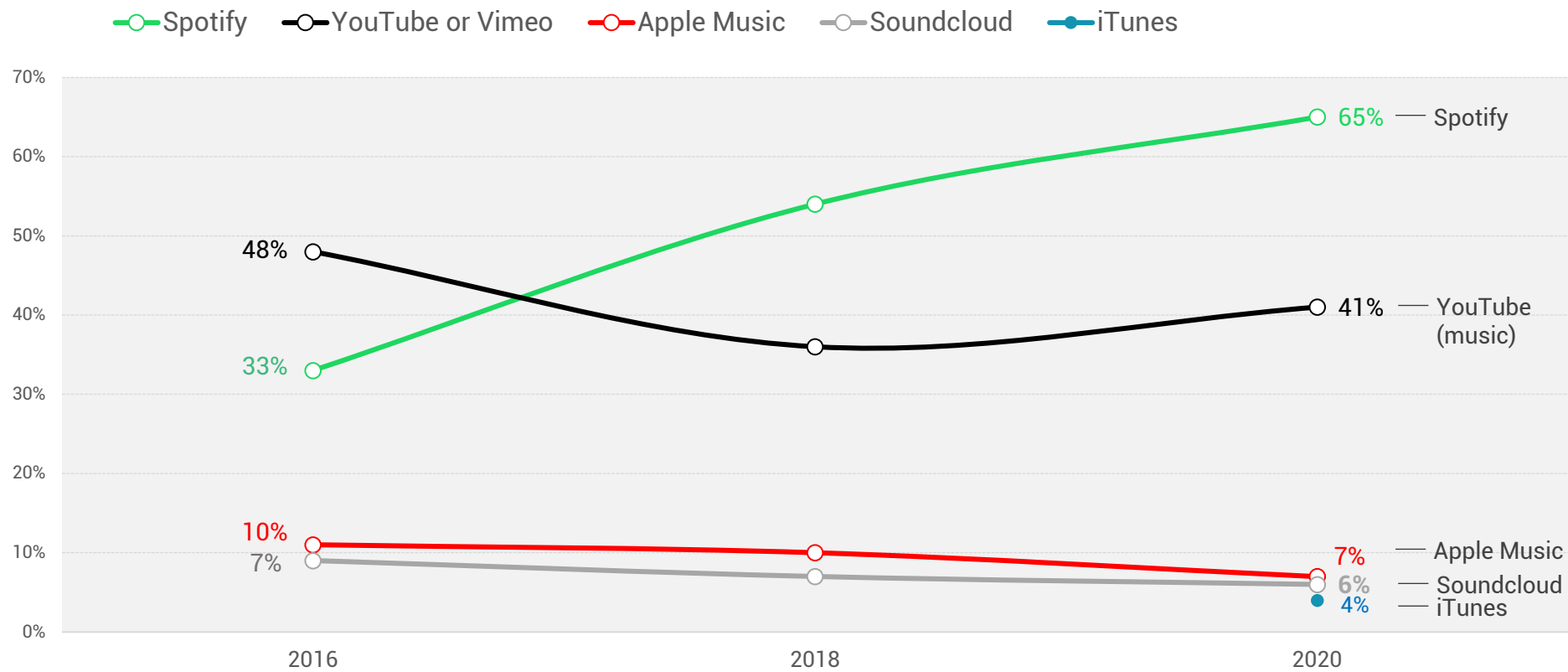
Q: Thinking about yesterday overall, which of the following websites did you use listen to music?



Spotify passed YouTube as the most popular provider at least two years ago and has continued to grow in popularity among 15-24s. The daily audience using other providers is relatively stable.

Daily reach of music streaming sites – all 15-24s.

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





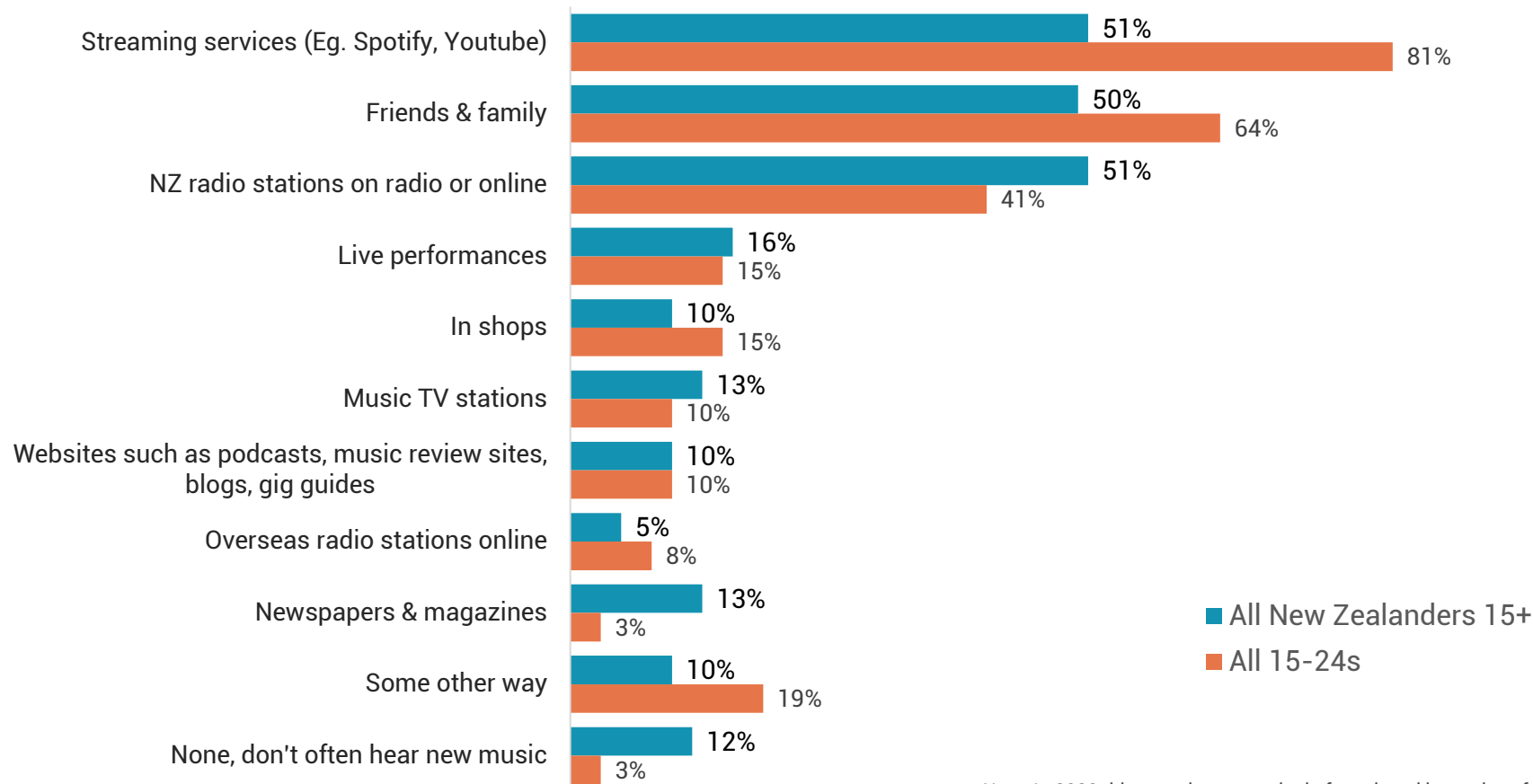
Music Consumption and Behaviour



Reflecting this age group's high incidence of listening to streamed music, these services are the main way 15-24s discover new music by a significant margin. This group are also more likely to be influenced by friends and family, and less so by the radio.

Sources of awareness of new music 2020 – all New Zealanders 15+ & all 15-24s.

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

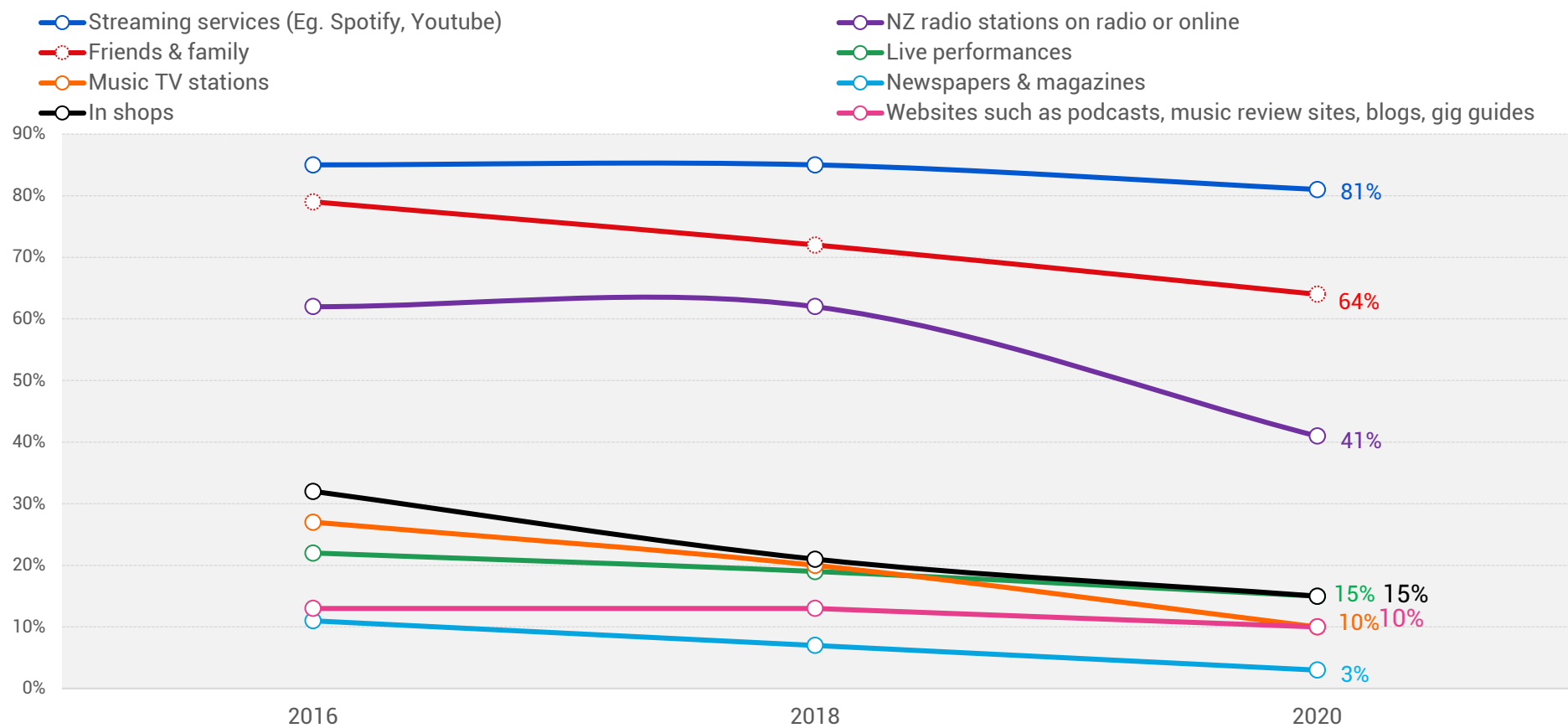


Note: In 2020 this question was asked of a reduced base size of n=186.

Streaming services have consistently been the main source of new music for most 15-24s for some time, however the influence of friends and family, and radio stations has declined over time.

Sources of awareness of new music over time – all 15-24s.

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=186



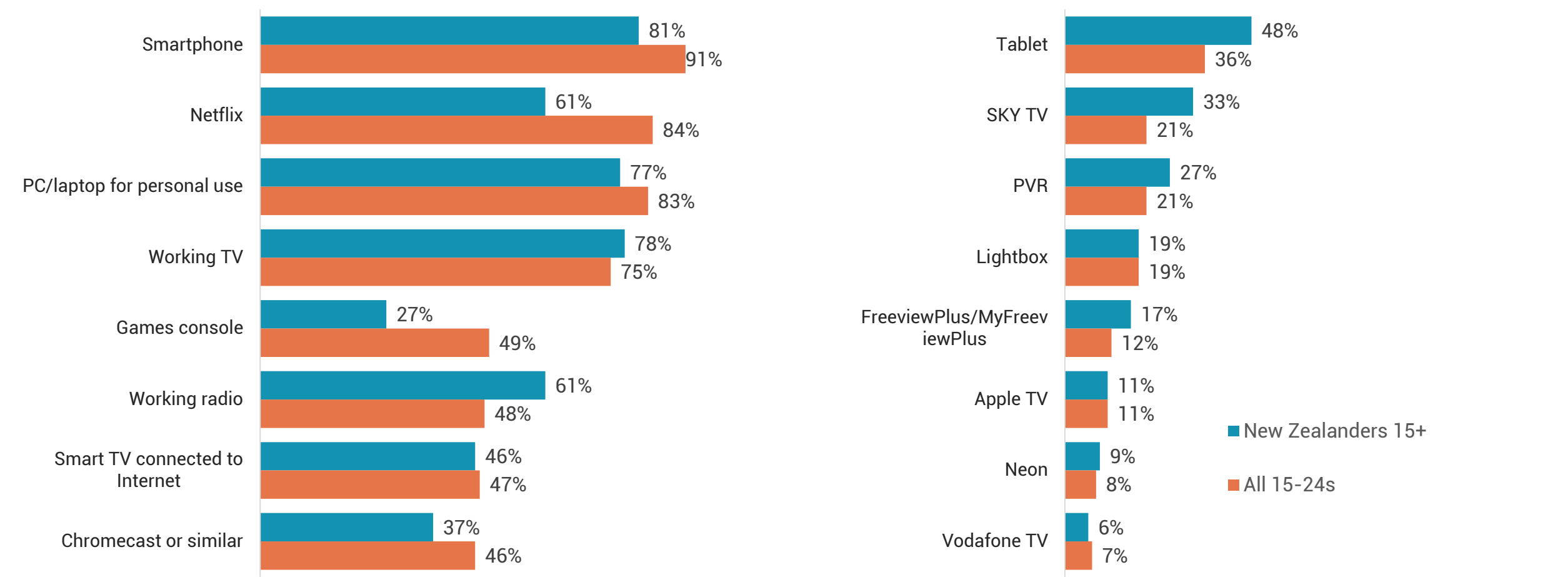
Devices Personally Own Or Have Daily Access To



While 15-24s are just as likely to have access to a TV as overall New Zealanders 15+, they are significantly more likely to have access to the devices and services that enable use of digital media, and especially Netflix (84%), games console (49%), and Chromecast or similar (46%).

Devices & platforms personally own or have daily access to – all New Zealanders 15+ & all 15-24s.

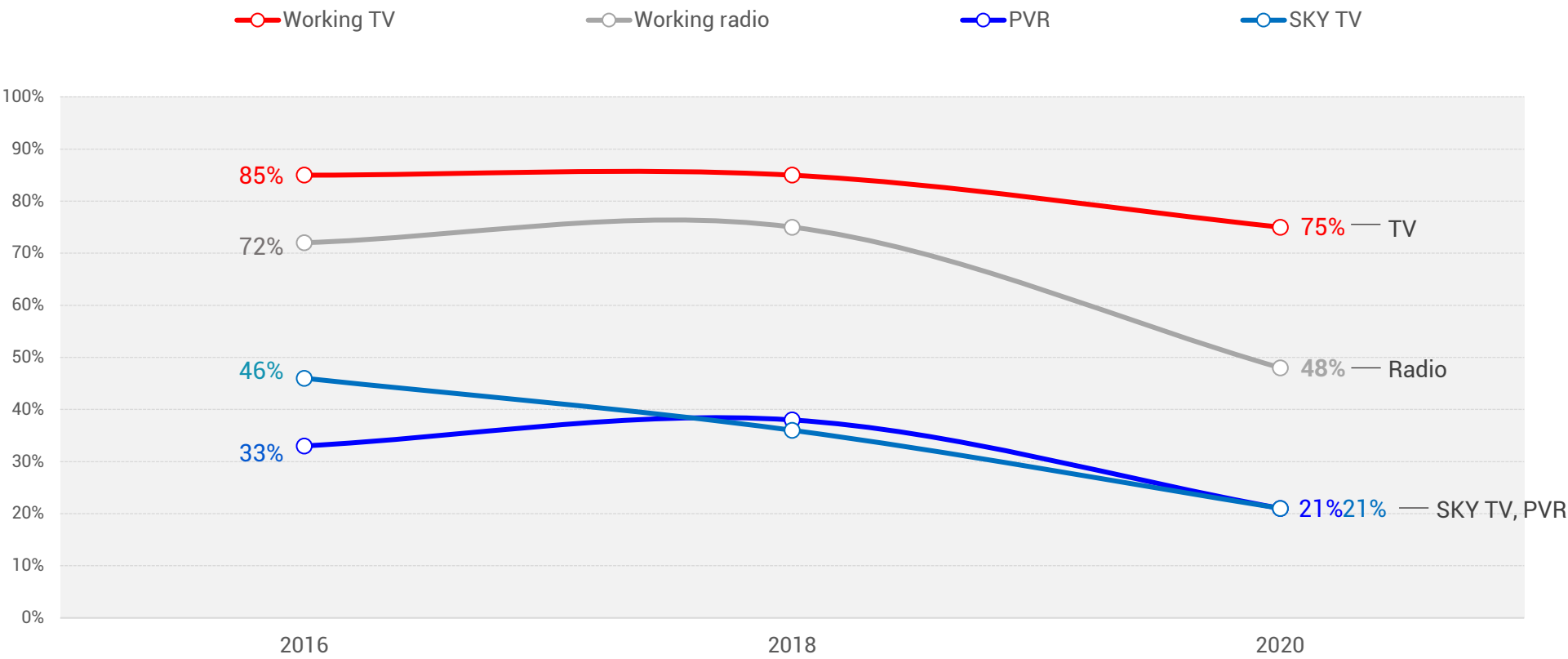
Q: Which of the following, if any, do you personally own or have daily access to?



The incidence of nearly all the devices and platforms that enable access to traditional media has been stable among 15-24s until the last two years, and now all show declines since 2018.

Devices & platforms personally own or have daily access to – all 15-24s.

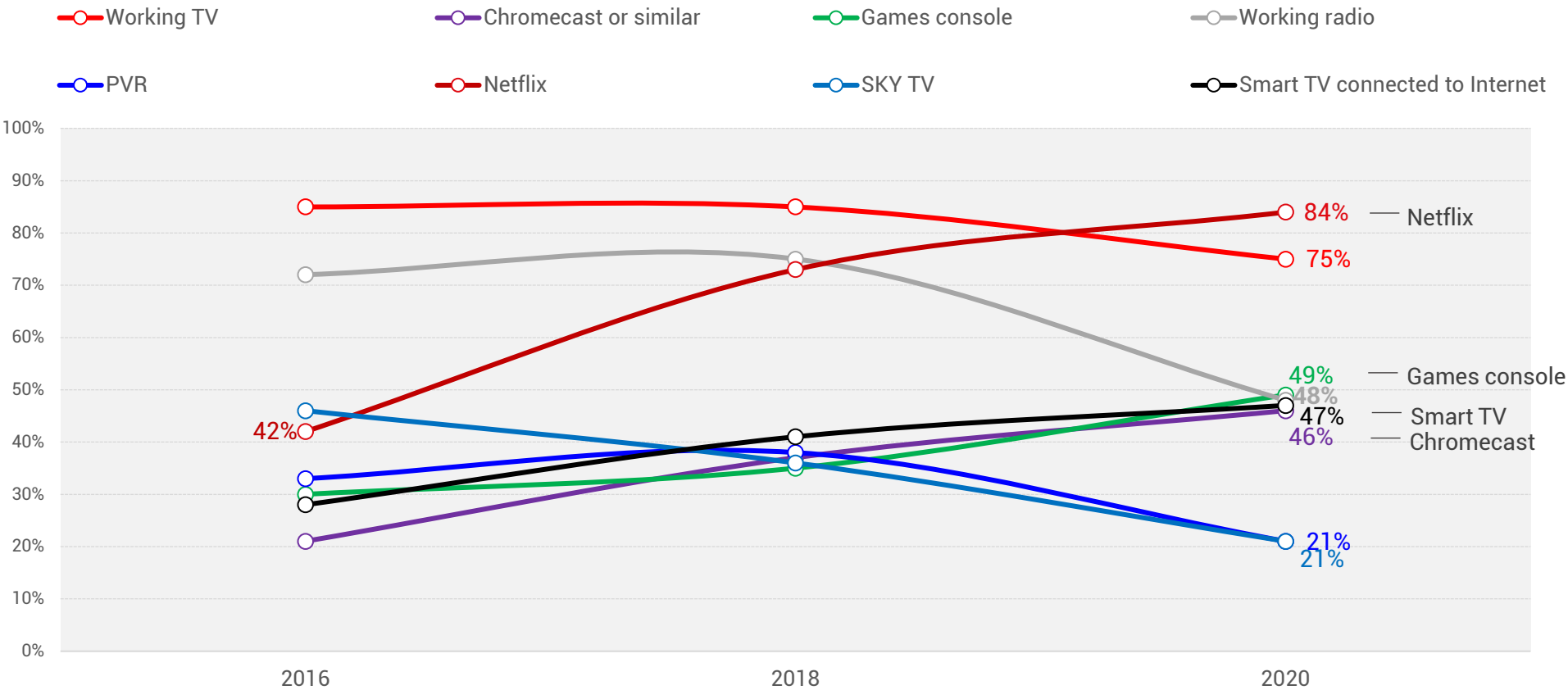
Q: Which of the following, if any, do you personally own or have daily access to?



Conversely Netflix, Chromecast or similar, smart TVs connected to the Internet and gaming consoles have continued to increase in incidence among 15-24s. More 15-24s now have access to Netflix than a working TV.

Devices & platforms personally own or have daily access to – all 15-24s.

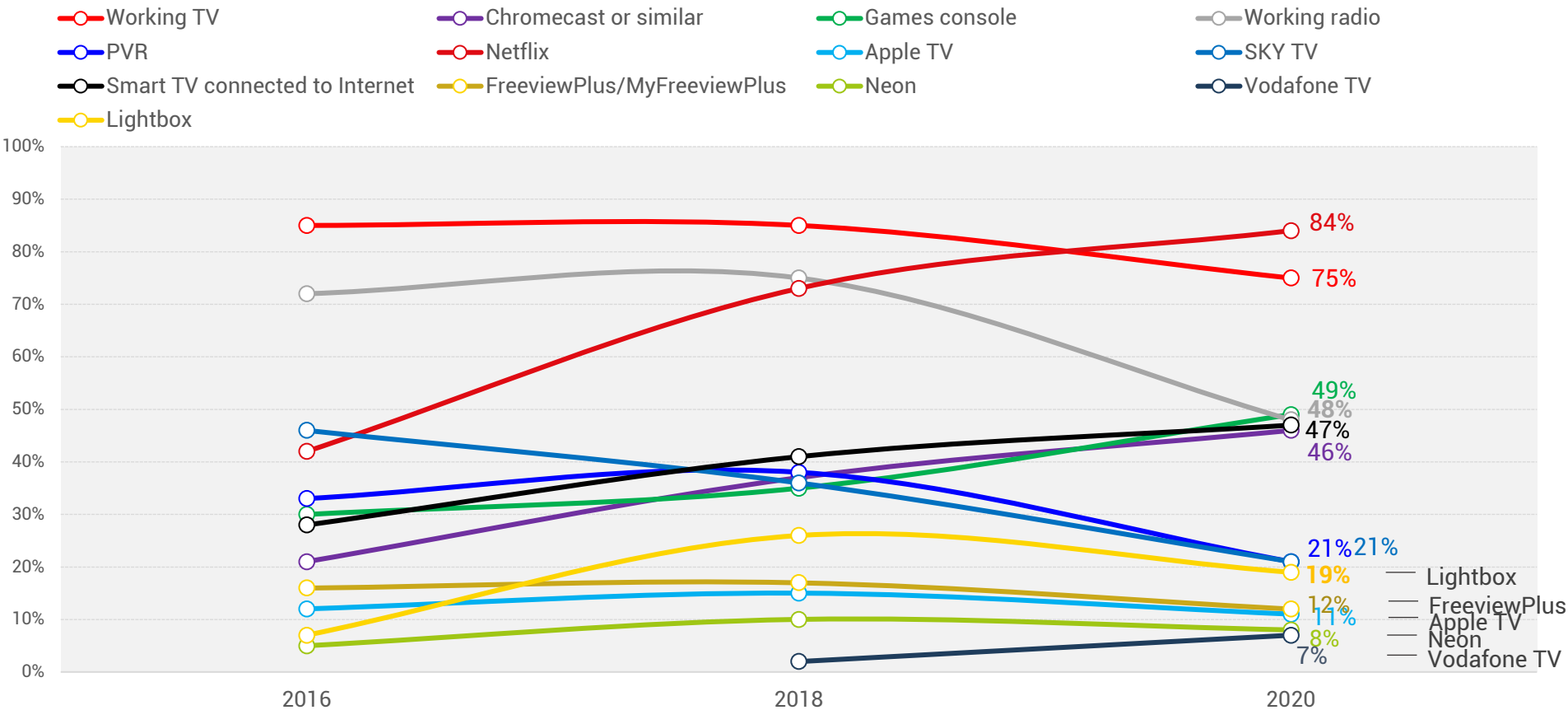
Q: Which of the following, if any, do you personally own or have daily access to?



Lightbox, FreeviewPlus/MyFreeviewPlus, Vodafone TV, Neon and Apple TV have not increased significantly in incidence since 2018, however Lightbox is now nearly as common as a PVR or SKY TV among 15-24s.

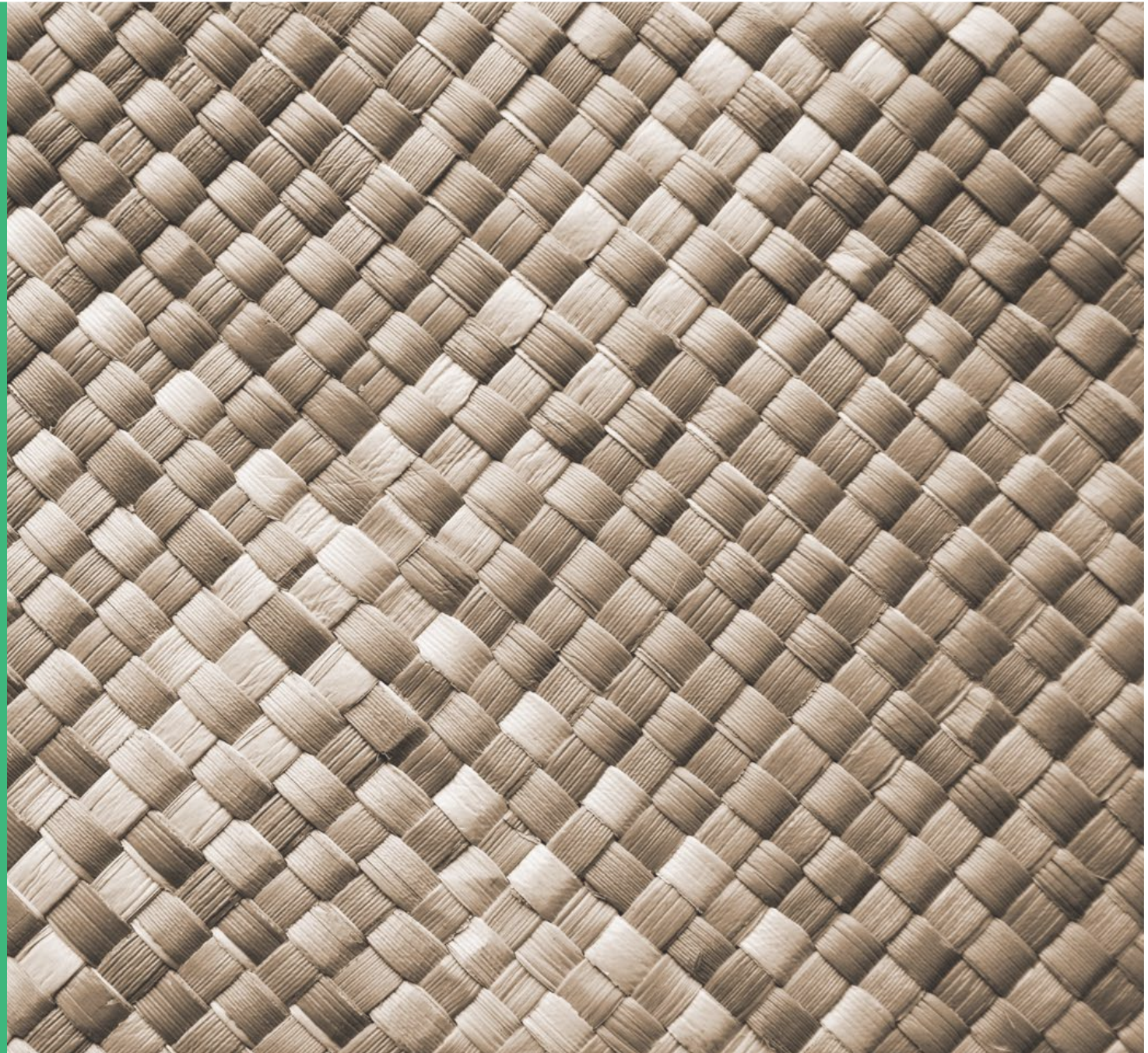
Devices & platforms personally own or have daily access to – all 15-24s.

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





Sources of news during Covid-19 lockdown

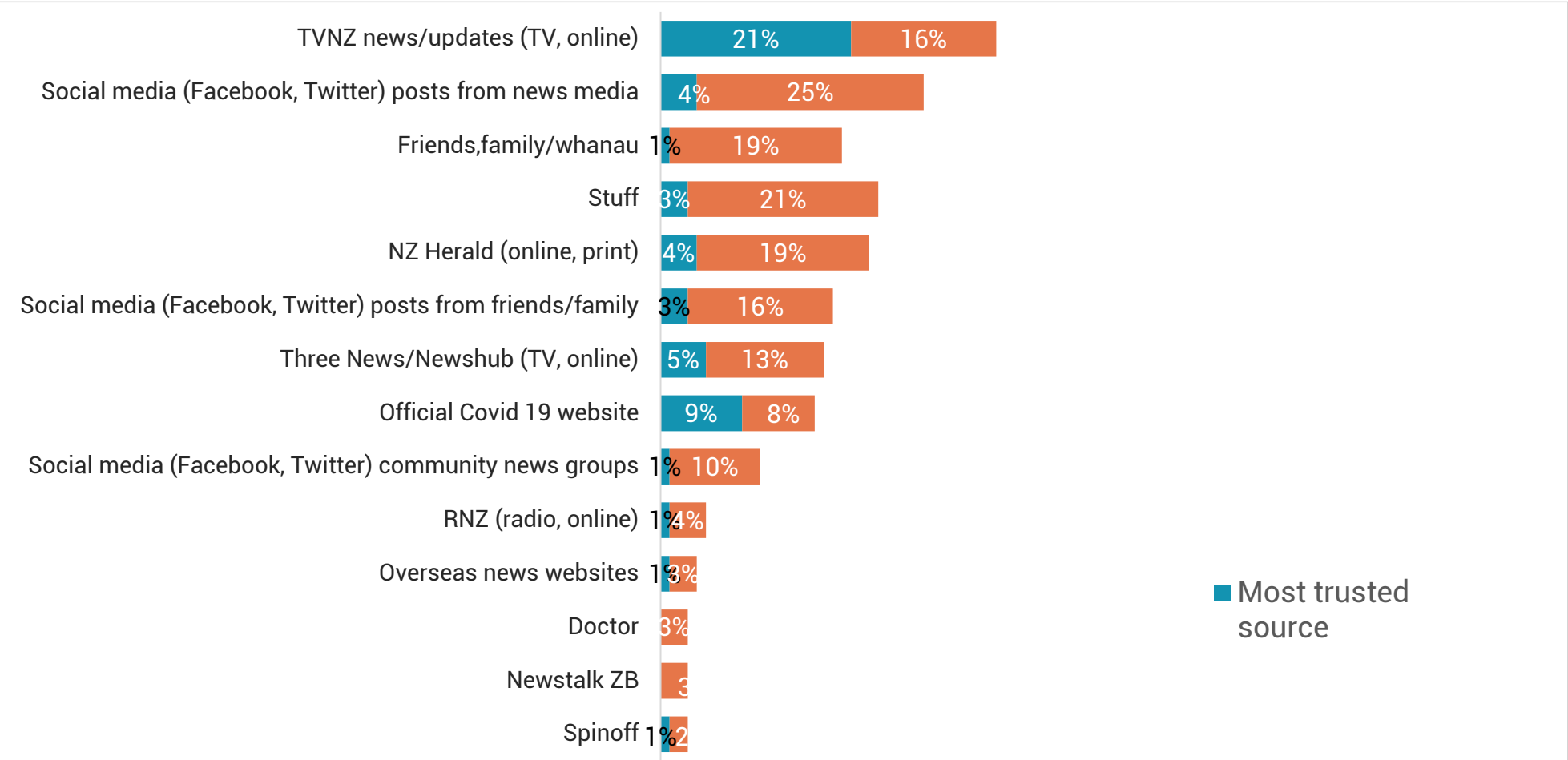


The daily TVNZ 1 Covid-19 updates were 15-24s's most widely used (37%) and most trusted (21%) source of news during lockdown. However this source was less dominant, and this age group had a wider range of sources they trusted most compared to overall New Zealanders. Social media (of different types) was also more trusted among this group (8% total) than average (4%).



Sources of news and information during COVID 19 lockdown (sources used by 5% or more) – all 15-24s.

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?





WHERE ARE THE **AUDIENCES?**

Youth (15-24s) report

SEPTEMBER 2020