Glasshouse

NZ On Air
Irirangi Te Motu

WHERE ARE THE AUDIENCES?

August 2021

Introduction

- **New Zealand On Air (NZ On Air) supports and funds public media content for New Zealand audiences, focussing on authentic NZ stories and songs that reflect New Zealand's cultural identity and help build social cohesion, inclusion and connection.**
- **It is therefore essential NZ On Air has an accurate understanding of the evolving media behaviour of NZ audiences.**
- **The Where Are The Audiences? study delivers an objective measure of NZ audience behaviour at a time when continuous single source audience measurement is still in development.**
- **This document presents the findings of the 2021 study. This is the fifth wave of the study since the benchmark in 2014 and provides not only a snapshot of current audience behaviour but also how behaviour is evolving over time.**
- **NZ On Air aims to hold a mirror up to New Zealand and its people. The 2021 Where Are The Audiences? study will contribute to this goal by:**
  - **Informing NZ On Air's content and platform strategy as well as the assessment of specific content proposals**
  - **Positioning NZ On Air as a knowledge leader with stakeholders.**
  - **Maintaining NZ On Air's platform neutral approach to funding and support, and ensuring decisions are based on objective, single source, multi-media audience information.**

Potential impact of Covid 19 on the 2020 study

- **The Where Are The Audiences? study has always been conducted in April and May to ensure results are not influenced by seasonal audience patterns.**
- **However in 2020 the study was delayed to May-June due to levels 3 and 4 Covid 19 lockdown prior to this period. Interviewing was then conducted while New Zealand was at levels 1 and 2.**
- **Comparing the 2020 results to the 2021 results and to trends over time shows that levels 1 and 2 conditions had only a minor impact on audience behaviour in 2020.**
- **For some media, particularly some digital media, this impact is reflected in slightly boosted audience sizes or increased time spent using in 2020 which have dropped back slightly in 2021, and for some content providers this is reflected in slightly reduced audience sizes in 2020 that have recovered slightly in 2021.**
- **Overall however the impact of Levels 1 and 2 on 2020 audience behaviour was minor and the results of the 2020 study are not strongly anomalous in the context of ongoing trends over time.**

Research Approach

- **The first priority in the design and conduct of the 2021 study was to ensure valid and robust comparisons to the previous studies. Therefore the research approach including methodology, sampling and respondent definition, question flow and wording, and weighting factors were kept consistent with all previous studies.**
- **This includes the key technique of asking respondents about their behaviour "yesterday" within specific time periods between 6am and midnight. This technique enables the creation of accurate survey based measures of actual behaviour by grounding responses in behaviour that is fresh in respondents' minds and within specific parts of an actual day.**
- **A total sample of n=1,420 was developed, with representative samples created for each day of the week so that results can be accurately extrapolated to represent a "typical" day.**
- **The total sample has a maximum margin for error of +/-2.6%.**
- **The results in this study will not exactly match data from sources such as TV ratings, radio surveys, or online analytics as the methodologies are different. However this study does provide an objective, single source comparison across all media.**

Research Approach

- As in all previous studies, a mixed methodology of telephone and online interviewing was used.
- N=800 interviews were completed by telephone using random digit dialling, and n=600 interviews were completed online using Consumer Link's Flybuys research panel. This breakdown upweights the proportion of online interviews compared to previous studies to better reflect the declining incidence of landlines in New Zealand (based on Nielsen CMI data).
- The online interviews were conducted among New Zealanders without access to a home landline.
- Interviewing was conducted between April 27 and May 24.
- Respondents were defined as all New Zealanders aged 15 and over.
- Regional sample stratification, and minimum quotas for males, 15-24 year olds and ethnic groups were implemented.
- The total sample has been post-weighted by the following factors to ensure it is representative of the 15+ NZ population;
  - Access to a landline, gender, age, ethnicity.

Research Approach

- **The study measured media consumed "yesterday", for how long, and which channels, stations and sites were used. This approach measured the daily audience behaviour of the main broadcast, print, online and music media, and forms the bulk of this report.**

- **Respondents were also asked about the type of online videos they watched, how they use on demand, how they become aware of new TV shows, their use of captioning and audio description, and sources of music discovery.**

- **Two key aspects were not included in this or previous studies;**
  - **Device used to consume media. (Ownership and access to devices was collected.)**
  - **Simultaneous media consumption.**

Changes made to the 2021 Where Are The Audiences? study

- The 2021 Where Are The Audiences? study is the first time it has been conducted one year after the previous study as opposed to two years. The charts in this report have been adjusted so the 2021 data points reflect the correct time scale to ensure time series trends are not visually impacted.

Online Video

- The online video has been split into two categories. The definition of these are:
  - Watch a video online using an overseas site/app like YouTube or Vimeo, Facebook, Snapchat, Instagram, or TikTok
  - Watch a video online using a New Zealand site/app like NZ Herald, WatchMe, Stuff, Play Stuff, Re:, Radio NZ, the Coconet, NZ On Screen or The Spinoff.
- The total online video category which is compared to previous is based the net reach of these two categories.
- Snapchat and TikTok have been included in the study for the first time.
- The New Zealand online video sites/apps are primarily news sites, with NZ On Screen included in this media for the first time.

Other Changes

- The weekly reach question was removed from the study in 2021 due to interview length constraints.
- Neon and Lightbox merged after the 2020 study. The results for “Neon” represent the merged provider in 2021.
- The news provider question has been adjusted to ask about news consumption in general as opposed to during Covid 19.

Abbreviations used in charts

Abbreviation	Media Type
TV Total	Total (net) Linear TV
Radio	Live NZ Radio
OS Online Video (new 2021)	Online Video e.g. YouTube, Facebook
NZ Online Video (new 2021)	Online Video e.g. NZ Herald, Stuff
SVOD Total	Total (net) SVOD
NZ SVOD	NZSVOD (e.g. Netflix, Lightbox)
OS SVOD	Overseas SVOD (e.g. Netflix, Hulu)
TV Pay	TV (via a pay TV platform)
TV FTA	TV (via free to air platform)
Music	Music (iPod, CDs)
Music Stream	Music online/streamed (e.g. YouTube, Spotify)
Online Radio	Online NZ radio

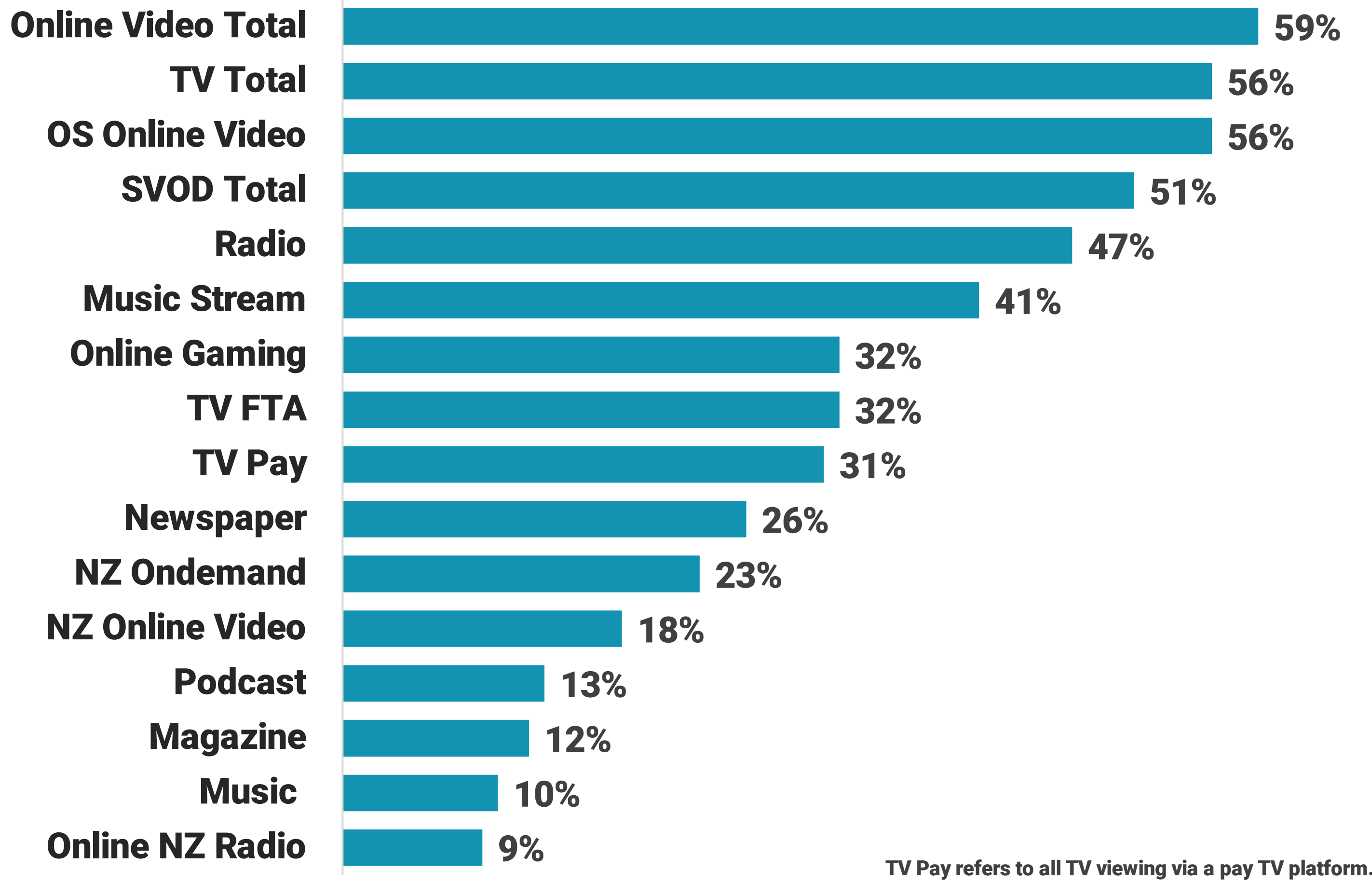
Abbreviation	Media Type
NZ OD	NZ Ondemand
Newspaper	Newspaper (including online)
Magazine	Magazine (including online)
Spotify	Listen to music on Spotify
Podcasts	Listen to podcasts
Music YT	Listen to music on YouTube
iHeartRadio	Listen to music on iHeartRadio
Pirate TV	Streamed, downloaded, torrented TV shows
Download Music	Downloaded songs/albums for free
Online gaming	Played games online on a gaming console, PC/laptop, phone or tablet

Summary & Conclusions

Daily audience sizes in 2021. The previous study suggested 2020 would be the cross-over point after which digital media would attract bigger audiences than traditional. This has proven accurate with online video now attracting the biggest daily audience over TV, with SVOD attracting the third biggest audience.

Daily reach of all media 2021 – all New Zealanders 15+

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time. Thinking first about the period between 6am and 9am yesterday, did you…



TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.
TV FTA refers to all TV viewing via a free to air platform.

- Online video reaches almost six in ten New Zealanders each day, with viewing of online video dominated by video on non-NZ sites and apps.
- TV reaches slightly fewer New Zealanders each day than online video but still reaches nearly six in ten New Zealanders each day.
- SVOD is reaches one in two New Zealanders each day, with radio slightly below this.

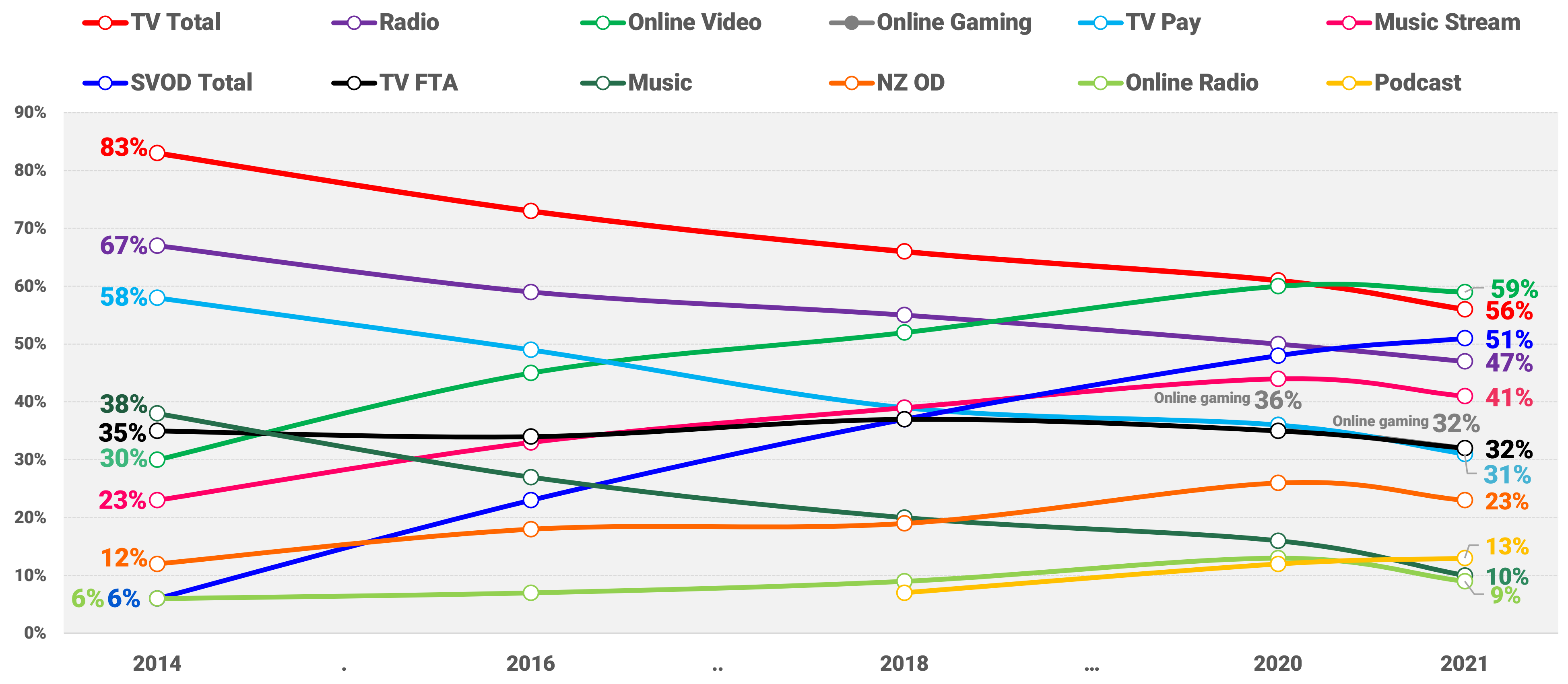
Note: TV viewing includes live and time shifted viewing, in and out of home.

Base: All New Zealanders 15+: (2021 n=1,420)

Daily audience sizes over time. Audiences using all media except SVOD have declined slightly or remained stable since 2020. Online video audiences have not grown - it now attracts the biggest daily audience due to the ongoing decline of TV audiences. Radio has also continued to decline and been overtaken by SVOD.

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

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



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

TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.
TV FTA refers to all TV viewing via a free to air platform.

- Audiences listening to streamed music, watching on demand and perhaps listening to online radio show a slight peak in 2020 which has declined slightly in 2021.
- TV viewing via both a free to air and pay TV platform has declined, but for the first time in the study there are bigger audiences watching TV via a free to air platform than a pay platform, as the audience on a pay TV platform has continued to decline at a faster rate.

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Daily audience sizes. 2020 has proven it was the cross-over point with 2021 results showing online video now attracting the biggest daily audience ahead of TV, and SVOD attracting the third biggest audience. However the driver of these outcomes is not simply ongoing growth of digital media and the decline of traditional media.

- **In 2018 there were signs the growth rate of digital media might have been slowing. However the 2020 results showed a return to previous growth rates or even an acceleration in growth for most digital media.**
- **The 2021 results again show that digital media audience growth might have slowed.**
  - **Daily online video audiences are stable since 2020, while the streamed music audience has declined slightly.**
  - **There are signs that Covid levels 1 and 2 may have driven a peak in viewing of on demand and listening to online radio which has since declined in 2021.**
  - **SVOD and podcasts are the only digital media to have grown their daily audiences since 2020.**
- **The main driver therefore of digital media over-taking traditional media is the consistent ongoing decline in traditional media.**
  - **Daily TV and radio audiences have continued to decline at the same rate over time with little sign that Covid levels 1 and 2 influenced these audiences either positively or negatively.**

Daily audience sizes. The decline in linear TV overall is driven by declining audiences watching via both a free to air platform but especially via a pay TV platform. For the first time, there are larger audiences watching TV via a free to air platform than via a pay TV platform.

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- In 2014 nearly six in ten New Zealanders (58%) watched TV each day via the SKY TV platform, compared to 35% who watched via a free to air platform.
- Since then the daily audience watching TV via a free to air platform has been stable – now at its lowest point but still reaching 32% of New Zealanders each day.
- Conversely the daily audience watching TV via a pay TV platform has fallen to 31% and the 2021 study shows no sign of this declining trend stabilising.
- These viewing trends are reflected in the proportion of New Zealanders who have daily access to SKY TV. In 2014 57% of New Zealanders had access to SKY TV compared to 30% who do so in 2021.
- Some audiences are significantly less likely to have access to SKY TV;
  - 15-34 year olds (21%)
  - Double income couples, without kids (12%)
  - Families with kids under 15 (14%)
  - Asian New Zealanders (13%)
  - Aucklanders (26%).

TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.
TV FTA refers to all TV viewing via a free to air platform.

Time spent using different media. Linear TV continues to hold New Zealanders' attention the longest by a significant margin, however this has declined significantly again in 2021. Despite an increase, time spent watching online video continues to lag behind SVOD and radio.

- While declining, New Zealanders still watch nearly two hours of linear TV each day (118 minutes) with viewers on a pay TV platform remaining heavier viewers than those on a free to air platform. TV has a greater ability to drive high engagement than other media, with a higher time spent viewing in relation to its audience size.
- The decline in time spent viewing TV continues to be driven by a larger decline in time spent viewing via a pay TV platform.
- With the exception of online video (increased to 70 minutes per day) and podcasts (12 minutes), time spent using all digital media has declined since 2020. Some of these declines (SVOD, streamed music, on demand and perhaps online gaming) suggest the increased time New Zealanders were dedicating to these media in 2020 may have been influenced by Covid 19 levels 1 and 2. This data suggests those conditions influenced time spent using digital media more than increasing audience sizes.
- Time spent listening to the radio has declined at the same rate as in the past – down to 74 minutes per day but narrowly ahead of online video.

Changes in video media audiences. Since 2020 the decline in daily reach of TV overall has come from not just lighter TV viewers but from heavier viewers as well – particularly from a pay TV platform.

- The 2016 and 2018 studies showed declining viewers on a pay TV platform, but increased time spent viewing among those remaining viewers on this platform. At the same time, time spent viewing SVOD and online video did not increase. These trends suggested lighter viewers were dropping out of linear TV and switching to SVOD and/or online video.
- In both 2020 and 2021 time spent viewing TV among viewers on a pay TV platform has declined along with audience size. This shows heavier TV viewers now dropping out of linear TV from the SKY TV platform.
  - Audience size and engagement among viewers is more stable over time among those watching TV via a free to air TV platform.
- Audience reach and engagement among viewers continues to grow for online video – users of this media now watch for an average of more than two hours per day.
- While SVOD audiences have continued to grow in size, there is evidence to suggest Covid 19 levels 1 and 2 drove a peak in engagement with this media in 2020, as time spent watching SVOD has declined among viewers in 2021.
- These trends are influenced by the devices and platforms New Zealanders have daily access to;
  - Nearly three quarters of New Zealanders (72%) now have access to SVOD and particularly Netflix (64%).
  - Nearly half have access to a smart TV connected to the Internet (47%) and four in ten (40%) have Chromecast or similar.
  - Three in ten (30%) have daily access to SKY TV.

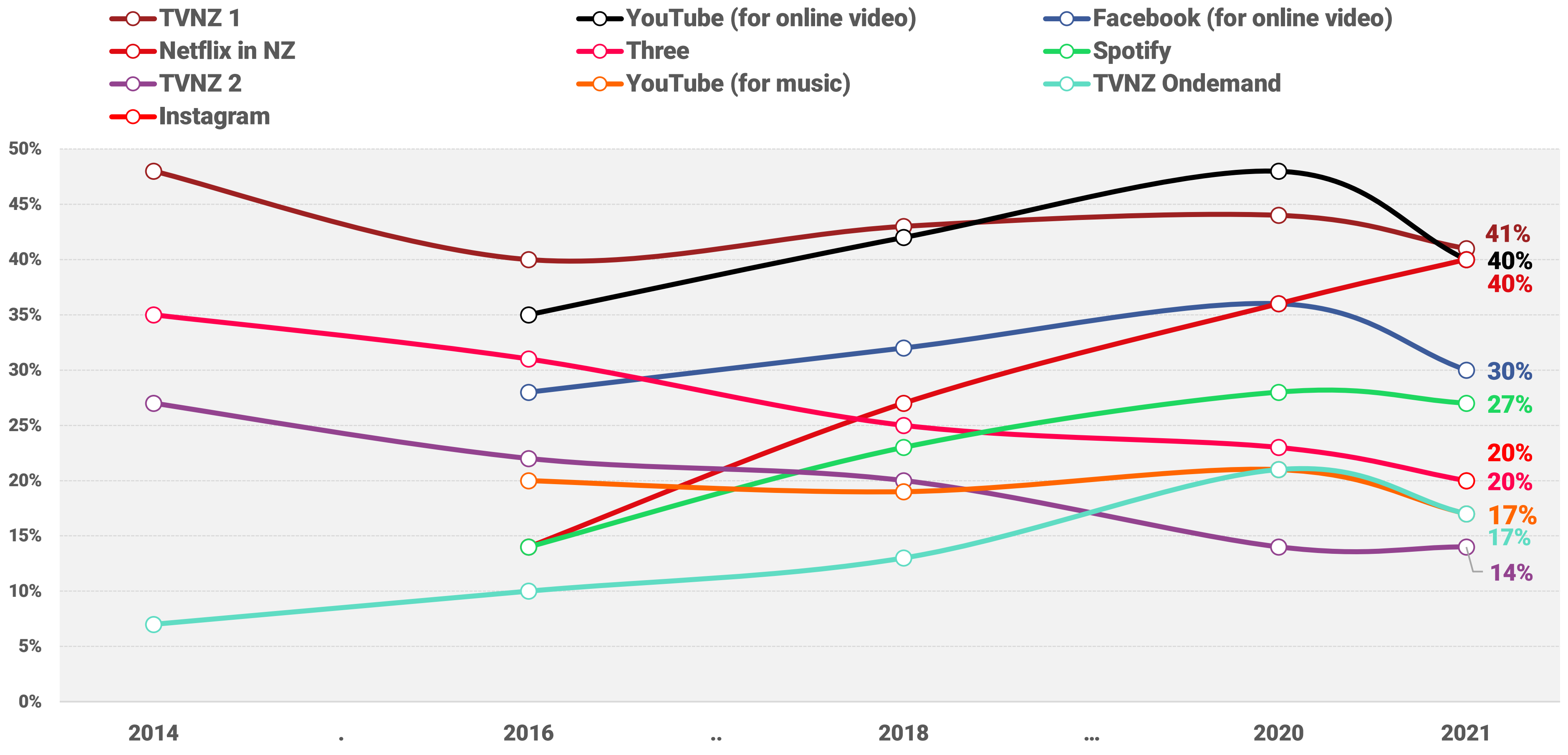
Changes in music audiences. The way New Zealanders access and listen to music has completely changed since the 2014 study. Four times as many New Zealanders now listen to streamed music each day compared to listening on physical formats, and they listen for longer.

- The proportion of New Zealanders who listen to music on physical formats each day has fallen to one in ten (10%).
- However as the size of this audience declines, it is increasingly made up of more dedicated, heavier listeners, and levels of engagement have in fact increased since 2020 to 110 minutes per day among listeners.
- Conversely while streamed music dominates New Zealanders' consumption of music (four in ten listen each day), audience sizes have not grown since 2020 and levels of engagement have declined for the first time – perhaps indicating a peak in time spent listening in 2020, possibly as a result of Covid 19 levels 1 and 2.

Top channels, sites & stations 2021. TVNZ 1, Netflix and YouTube are the content providers who attract the biggest daily audiences in New Zealand in 2021. Netflix has continued to grow its audience reach to four in ten New Zealanders, while nearly all other top providers have declined since 2020.

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

Q: Which of the following did you use yesterday?



Next tier:

• RNZ National	12%
• TikTok	11%
• Stuff (video)	11%
• NZ Herald (video)	9%
• Newstalk ZB	9%
• Disney Plus	9%

YouTube (for video) and Facebook (for video) have declined significantly which may indicate a peak in viewing in 2020, but could also be influenced by the addition of other overseas online video sites to the survey in 2021.

TVNZ OnDemand and YouTube (for music) show indications of a peak in audiences in 2020 which has declined in 2021.

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Daily reach of specific channels, sites and stations.

Online video sites - overseas

- **Measurement of online video audiences changed in 2021 to measure overseas providers separately from NZ providers and to include additional overseas sites in the survey.**
- **YouTube (for video) remains the most popular site, reaching four in ten New Zealanders each day (40%), followed by Facebook (for video) (30%). Both these sites show a decline in daily reach since 2020.**
- **Instagram is third most popular (20%), followed by TikTok (11%) and Snapchat (8%).**

Online video sites – NZ based

- **Stuff/Play Stuff (11%) and NZ Herald (9%) are the most popular NZ based online video providers.**
- **The daily reach of these sites is stable over time, with no indications of impact, either positive or negative, by Covid 19 levels 1 and 2.**

Daily reach of specific channels, sites and stations.

TV Channels

- **TVNZ 1 is the most popular TV channel, reaching four in ten New Zealanders (41%) each day, and this audience is stable over time.**
- **Three is second most popular but daily reach continues to decline at a steady rate, now reaching one in five New Zealanders each day (20%).**
- **The decline in TVNZ 2's daily audience has halted in 2021, with this channel reaching 14% of New Zealanders each day.**
- **SKY Sport channels show a slight recovery to reach 7% of New Zealanders each day, after falling to 5% (from 10%) in 2020 when there was no live sport available to view.**
- **Six TV channels now reach 4% of New Zealanders or more each day.**

Daily reach of specific channels, sites and stations.

SVOD providers

- **Netflix is the dominant SVOD provider and has continued to grow its audience at a consistent rate – now reaching four in ten New Zealanders (40%) each day.**
- **No other SVOD provider reaches more than 9% of New Zealanders each day, with Disney Plus being the second most popular.**
- **Neon has grown significantly since the merger with Lightbox – now reaching 6% of New Zealanders each day.**

On demand sites

- **TVNZ OnDemand is the most popular on demand site, reaching 17% of New Zealanders each day. This has declined since 2020 when one in five (21%) watched TVNZ OnDemand each day, and suggests there may have been a peak in viewing 2020.**
- **Audiences on all other on demand sites are stable over time, with 3NOW the second most popular (5% reach).**
- **More than one in two on demand viewers (53%) use on demand as a primary source of content either exclusively (31%) or as well as a source of catch up (22%).**
- **The profile of the overall on demand audience continues to be more broad than other media, attracting both older TV viewers as well as younger digital media users.**

Daily reach of specific channels, sites and stations.

Radio stations

- RNZ National continues to be the most popular radio station, reaching more than one in ten New Zealanders (12%) each day, followed by Newstalk ZB (9%). Audiences on both stations are stable.
- There are indications of a dip in the size of radio audiences in 2020 and a return to 2018 levels in 2021, although nearly all these movements are within the margin for error.
- The exceptions are the significant growth in audiences listening to The Breeze (up to 6%) and Magic Talk (up to 4%).

Music streaming sites

- Spotify (27% daily reach) continues to be the most popular music streaming site, though its audience has not grown since 2020.
- YouTube (for music) (17%) is second most popular but its daily reach has declined in 2021.
- Music streaming sites are equally as influential as radio stations in terms of finding new music, with the more personal influence of word of mouth from friends and family declining dramatically in 2021.

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

Primary Differentiator:

- **Age /Lifestage**

Secondary Factors

- **Socio-economic level – the second most influential factor**
- **Ethnicity**
- **Region**

Primary differentiator. **There continues to be a generation gap in media consumption between younger and older New Zealanders. However as media consumption trends evolve it is becoming more of a continuum than a divide, and the age at which that change occurs varies by different media.**

- **In 2016 there was a stark divide at ages 40-45 between younger New Zealanders who were more likely to engage with digital media and older New Zealanders more likely to use traditional media.**
- **In 2018 that generation gap remained strong, especially for traditional media as younger New Zealanders continued to drop out of those media. However the generation gap had closed a little for digital media as older New Zealanders adopted those media in greater numbers.**
- **There is no longer a single divide between younger and older audiences who are more or less likely to consume traditional or digital media. For most media it is now more accurate to say there are three generations of media consumers; a young audience where digital media dominates, a middle aged audience more divided between traditional and digital media, and an older audience among whom traditional media still dominates.**
- **This three generation landscape is a result of middle aged New Zealanders continuing to reduce their use of traditional media and adopting digital media in greater numbers.**
- **The ages which define these three audiences varies between media, and are summarised on the next page.**

The three generations of media use. The ages of the three generations of media consumers vary by media, with the middle generation typically being defined between a broad age range of 40 and 59.

Defining daily media audiences by age

TV	Less viewing 15-39s	Average use 40-49s	More viewing 50+
SVOD	More viewing 15-44s	Average 45-59s	Less viewing 60+
Radio	Less listening 15-44s	Average 45-59s	More listening 60+
Online Video	More viewing 15-39s	Average 40-59s	Less viewing 60+
Music Streaming	More listening 15-39s	Average 40-44s	Less listening 45+
Podcasts	More listening 15-29s	Average 30-59s	Less listening 60+
Gaming	More playing 15-24s	Average 25-54s	Less playing 55+

There is one exception to the three generations of media behaviour:

- The on demand audience remains broad with no clear generation gap – the biggest audiences are aged 40-59.

The combination of TV based content and a digital channel means on demand appeals relatively equally to younger, more digitally savvy audiences, as well as older, more traditional TV audiences.

Summary of other topics

Sources of news and information

- TVNZ News (on air or online) is the most widely used (50%) and trusted source (22%) of news among New Zealanders.
- Stuff is second most widely used (42%), but slightly more New Zealanders trust the NZ Herald (12%) rather than Stuff (10%).
- Radio NZ (on air or online) is New Zealanders' fourth most trusted source of news (9%), followed by Three Newshub (8%).

Captioning and audio description

- The use of captioning (38%) and audio description (7%) continues to grow.

Use of unauthorised platforms

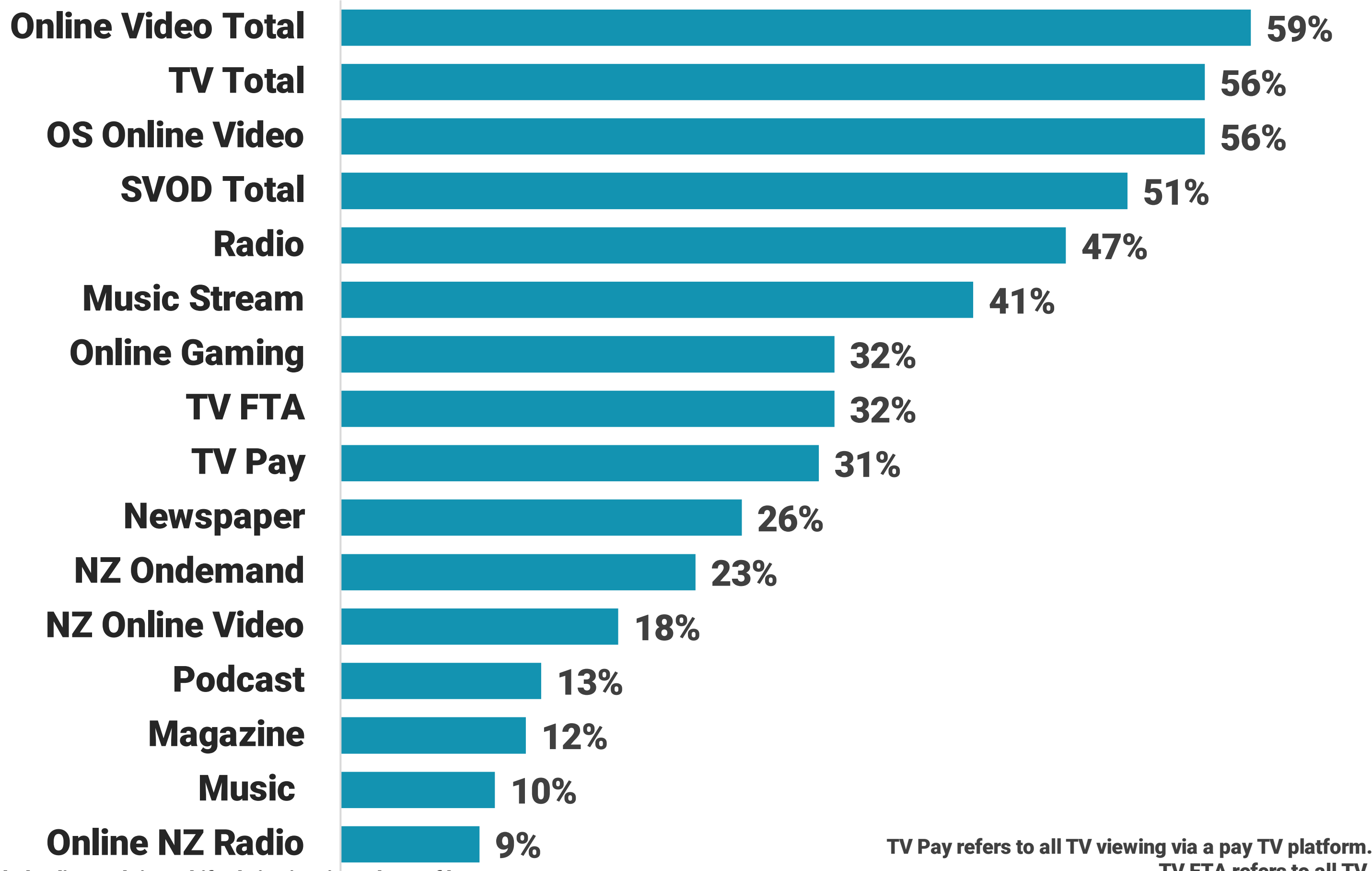
- The proportion of New Zealanders who have ever used unauthorised platforms is not growing – one in two have never done any of these activities. Fewer than one in ten New Zealanders engage in these activities once a week or more.

Daily Media Consumption

Daily audience sizes in 2021. 2020 has proved to be the cross-over point after which digital media attracts bigger daily audiences than traditional media. Online video now reaches the biggest daily audience - nearly six in ten New Zealanders. TV attracts the second biggest audience each day - more than one in two New Zealanders. SVOD (51%) reaches the third biggest audience.

Daily reach of all media 2021 – all New Zealanders 15+

Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time. Thinking first about the period between 6am and 9am yesterday, did you…



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

TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.
TV FTA refers to all TV viewing via a free to air platform.

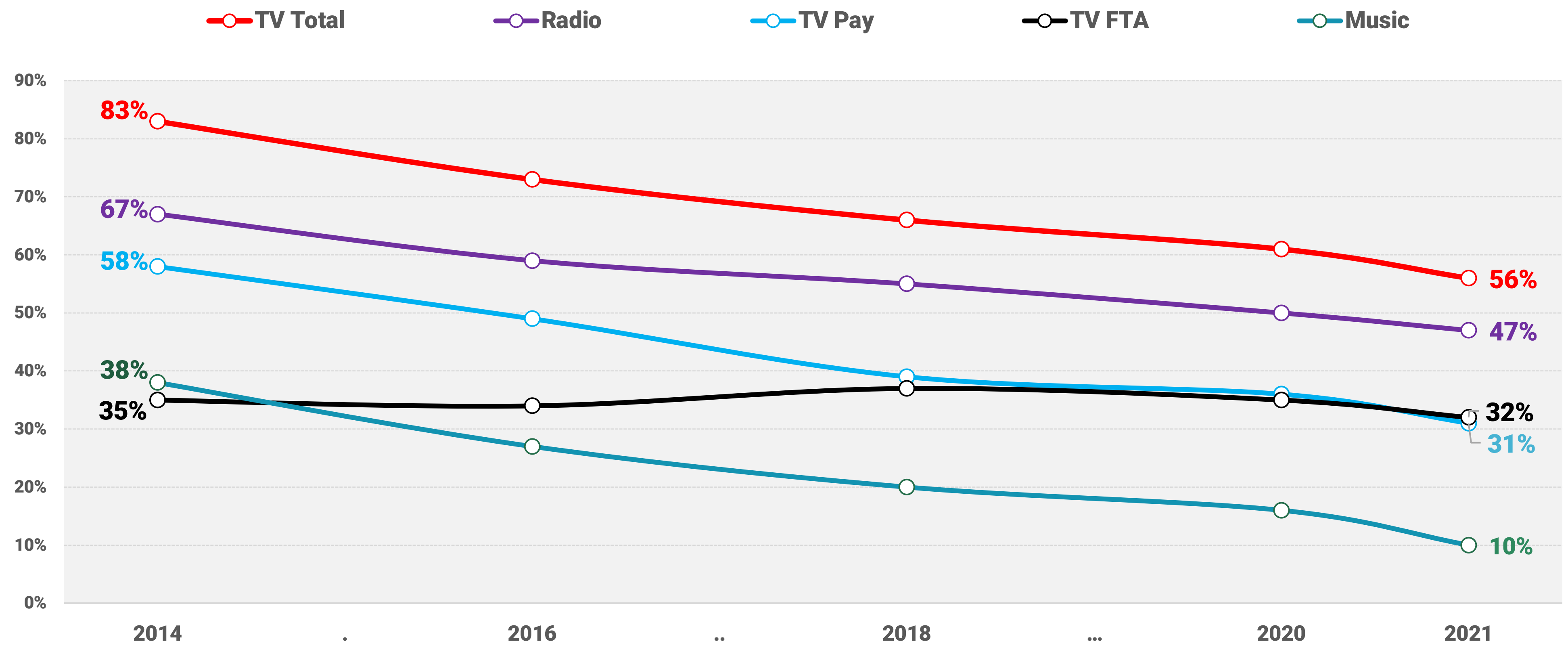
- Viewing of online video is dominated by viewing video on non-NZ sites and apps.
- In contrast NZ online video reaches fewer than one in five New Zealanders.
- The net daily reach of New Zealanders listening to broadcast radio and/or online NZ radio is 51%.

Base: All New Zealanders 15+: (2021 n=1,420)

Daily audience sizes over time. Audiences using traditional media have continued to decline at the same rate since 2020, except for listening to music on physical formats which has declined more rapidly in the last 12 months. There are no significant trends indicating that 2020 was an anomalous period for usage of traditional media.

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

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



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

- TV viewing via both a free to air and pay TV platform has declined. However for the first time there are bigger audiences watching TV via a free to air platform than via a pay TV platform. This is because the audience on a pay TV platform has continued to decline at a faster rate than via a free to air platform.
- A later section of the report shows that 30% of New Zealanders can now access SKY TV.

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

Daily audience sizes over time. Audiences using digital media, except SVOD, have also declined slightly or remained stable since 2020. Online video audiences have not grown - it now attracts the biggest daily audience due to the ongoing decline of TV audiences. SVOD is the exception and has continued to grow and now attracts the third largest daily audience.

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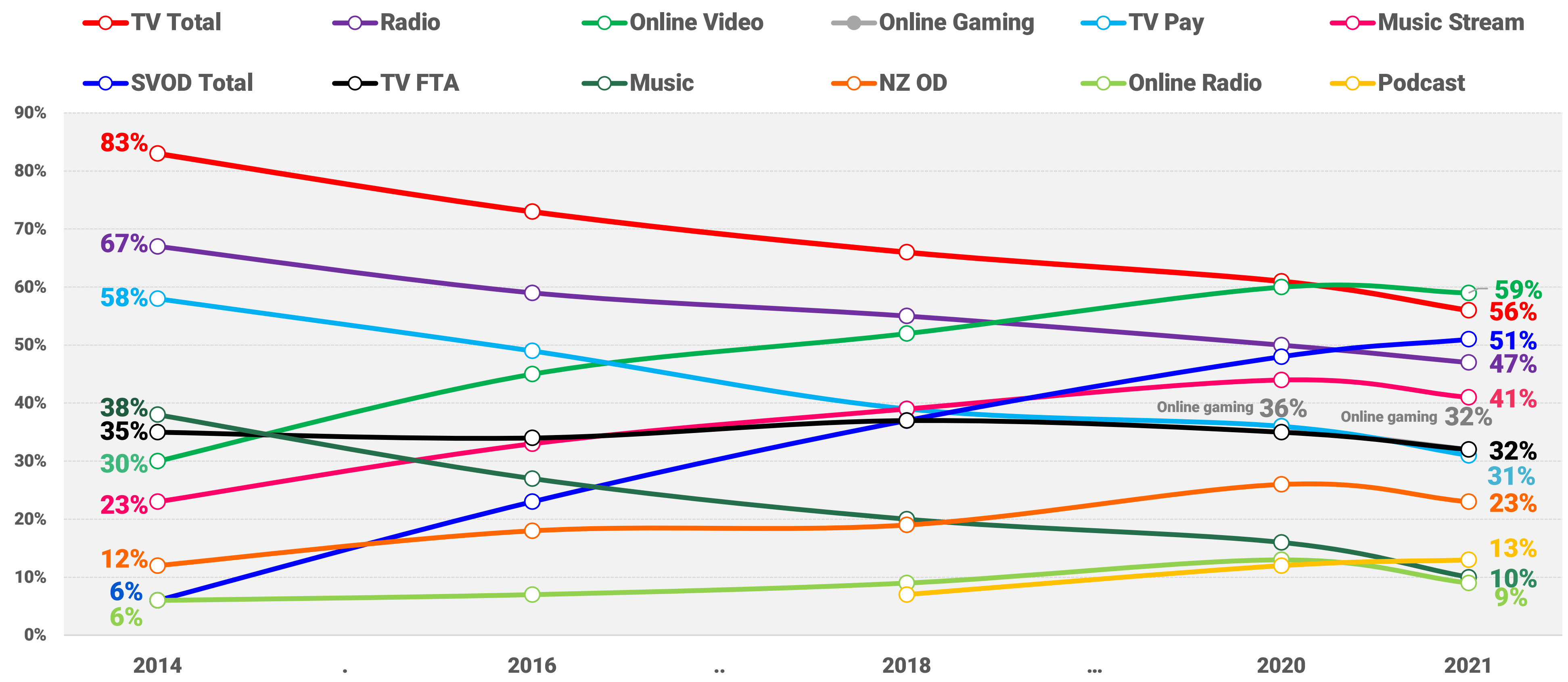
Daily reach of all media over time – all New Zealanders 15+

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



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

- Audiences listening to streamed music, watching on demand and perhaps listening to online radio show a slight peak in 2020 which has dropped off slightly in 2021.
- 2020 was summarised as the cross-over point after which digital media might attract bigger audiences than traditional media. These results show that prediction to be accurate despite slight declines in some digital media audiences.

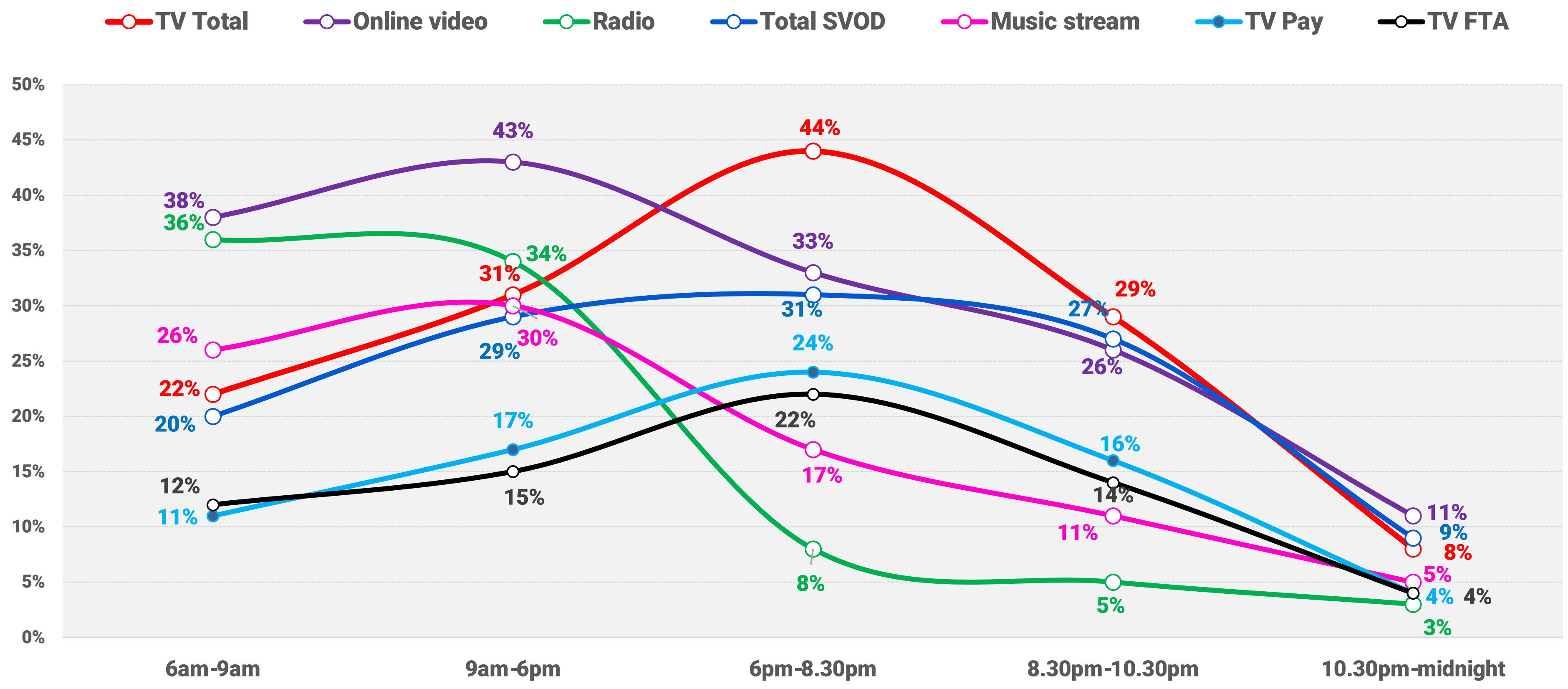
Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Note: Time period between 2020 and 2021 is 1 year and others are 2 years

The way New Zealanders consume media changes over the day. Online video now attracts the biggest or equal biggest audience for most of the day, except between 6-8.30pm when TV still dominates. Radio starts many New Zealanders' days but declines rapidly after 6pm. SVOD has a less defined peak and its audience size is relatively stable from 9am to 10.30pm.

Reach of media over the day 2021 – all New Zealanders 15+

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



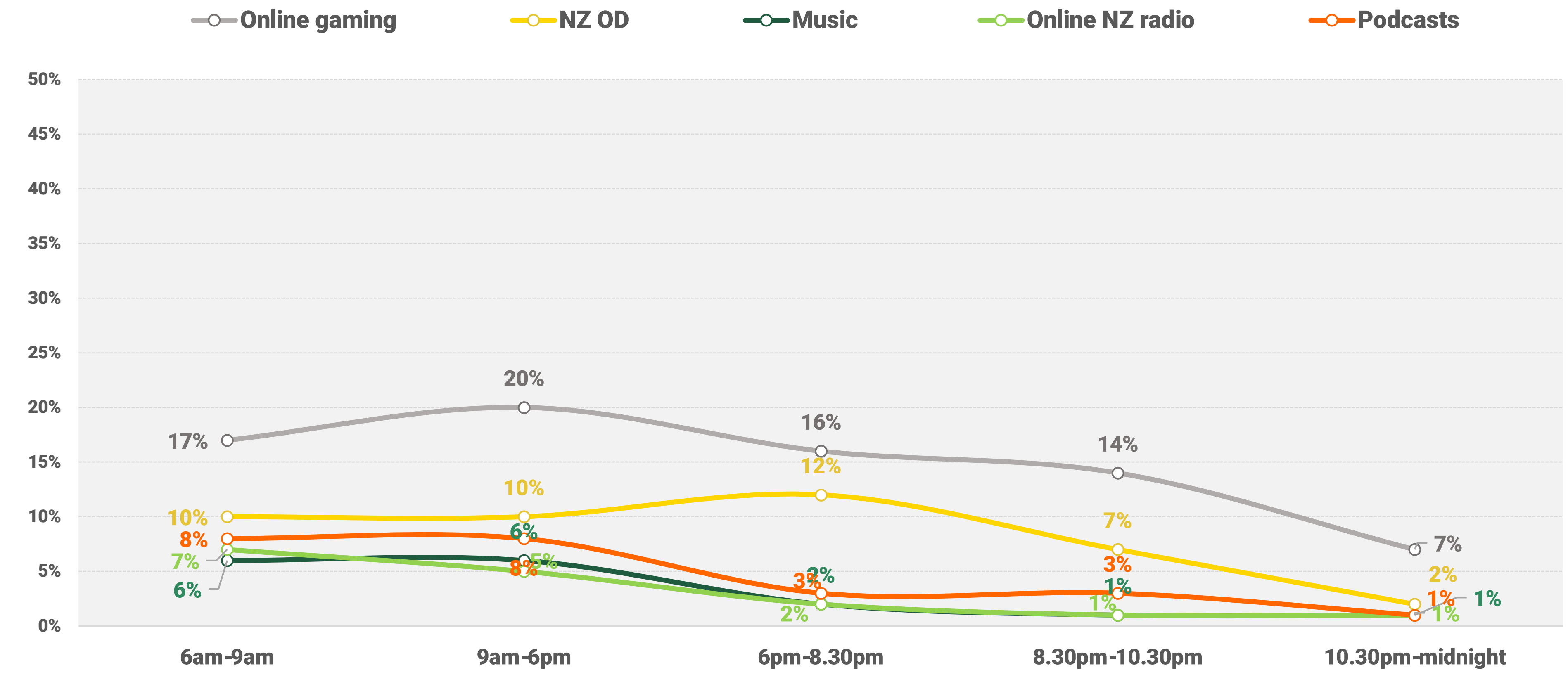
The key changes in New Zealanders' pattern of daily consumption since 2020, are:

- Radio no longer attracts the biggest audience at the very start of the day, mainly driven by growth in online video at this time.
- TV no longer dominates the late peak period from 8.30-10.30pm, mainly driven by a decline in TV viewing at this time. It now competes equally for New Zealand audiences with online video and SVOD.

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

Reach of media over the day 2021 – all New Zealanders 15+

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

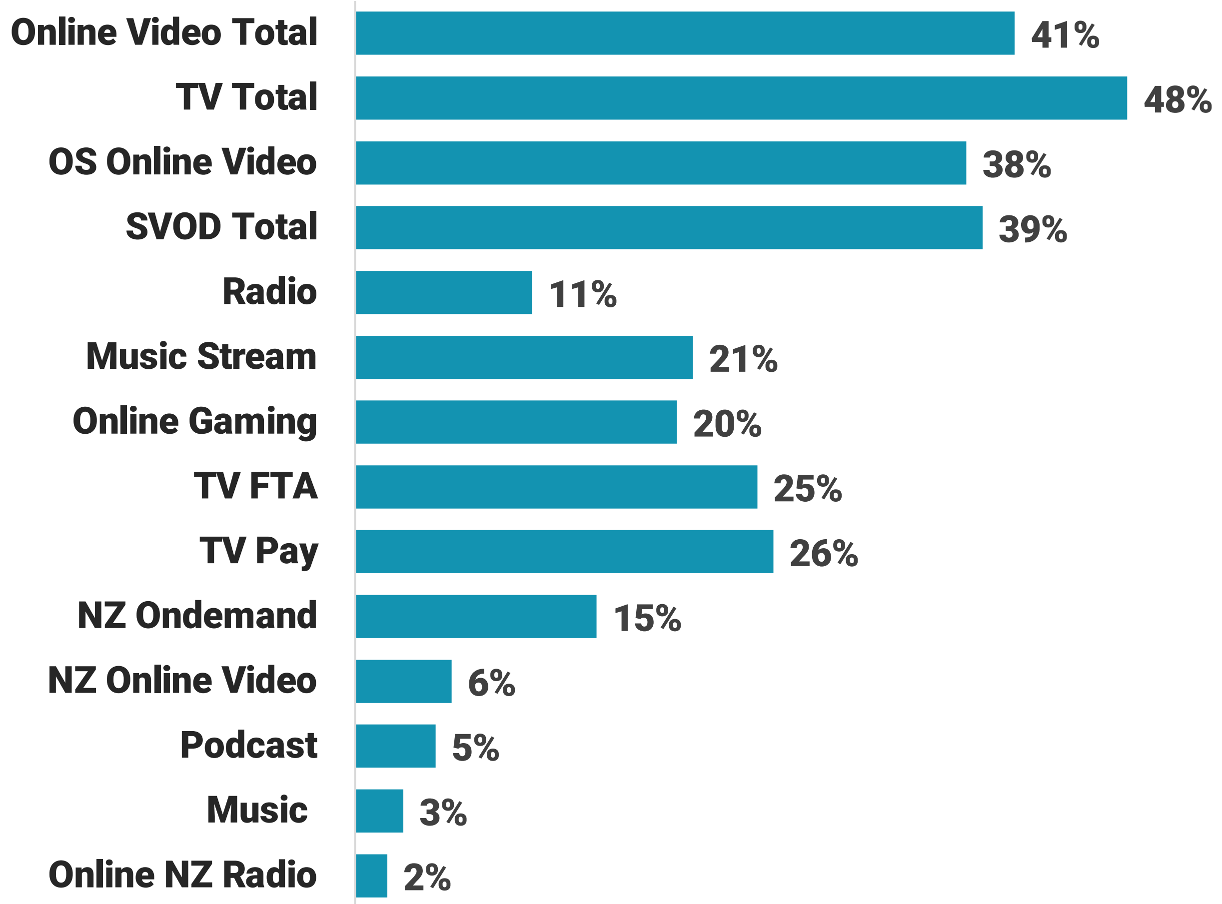


- There have been few changes in the daily pattern of consumption of these media since 2020.
- The exception is the significant decline in the number of New Zealanders playing online games between 9am-6pm (from 26% to 20%), indicating a daytime boost in online gaming during Covid levels 1 and 2 in 2020.

Peak time audience sizes in 2021. During the traditional TV peak period of 6pm-10.30pm, TV continues to attract the biggest audience - nearly one in two New Zealanders - however online video and SVOD also attract four in ten New Zealanders over this period.

Peak time reach of all media 2021 (6pm-10.30pm) – all New Zealanders 15+

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



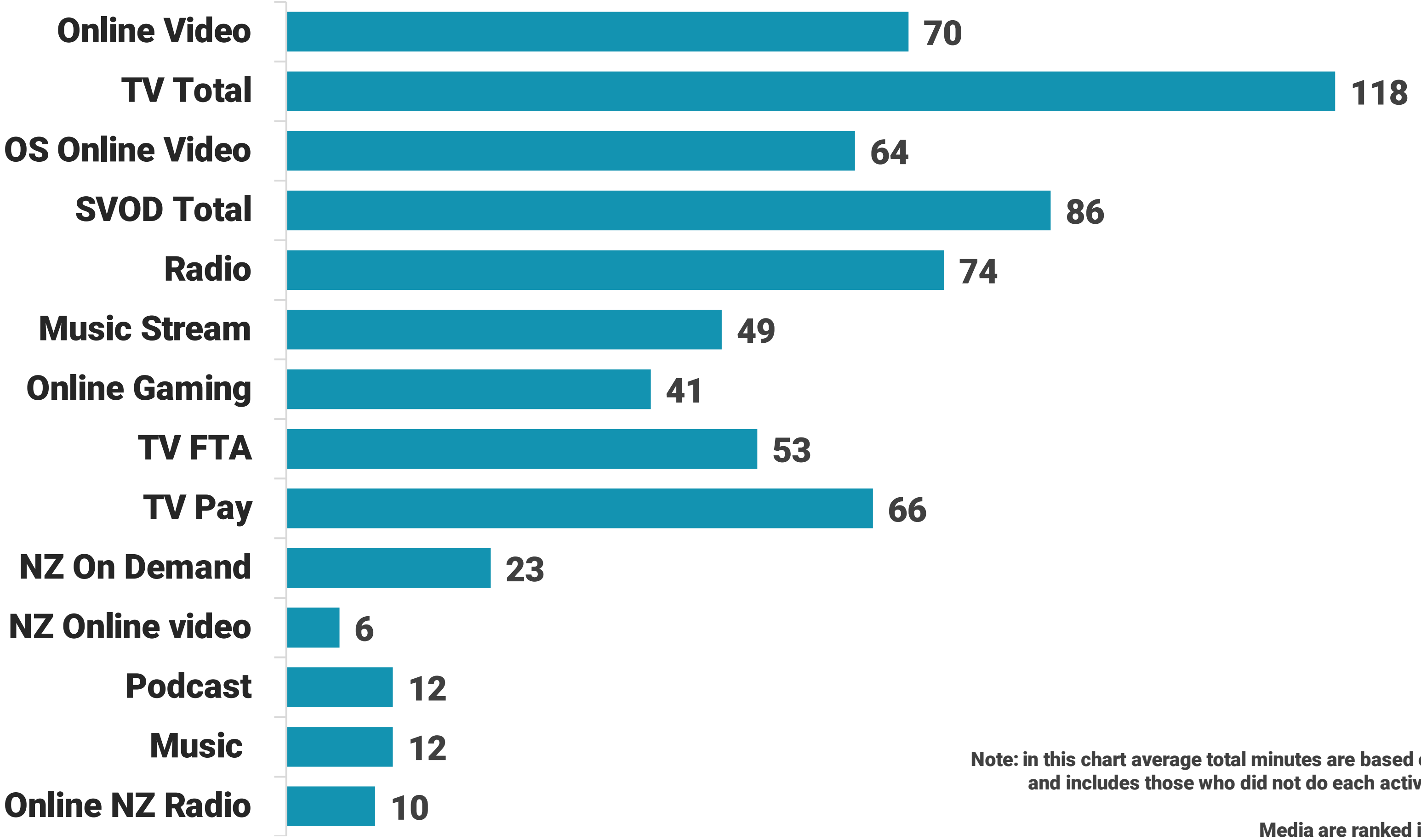
Note: media ranked in order of total daily reach

Base: All New Zealanders 15+: (2021 n=1,420)

Time spent consuming media 2021. New Zealanders continue to dedicate the most time to linear TV – nearly two hours per day on average. New Zealanders watch SVOD for the second longest (just under 90 minutes per day). While online video attracts the biggest daily audience overall, New Zealanders consume this media for less time than TV, radio and SVOD.

Time spent consuming media 2021 – average minutes per day. All New Zealanders 15+

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



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

Media are ranked in order of daily reach.

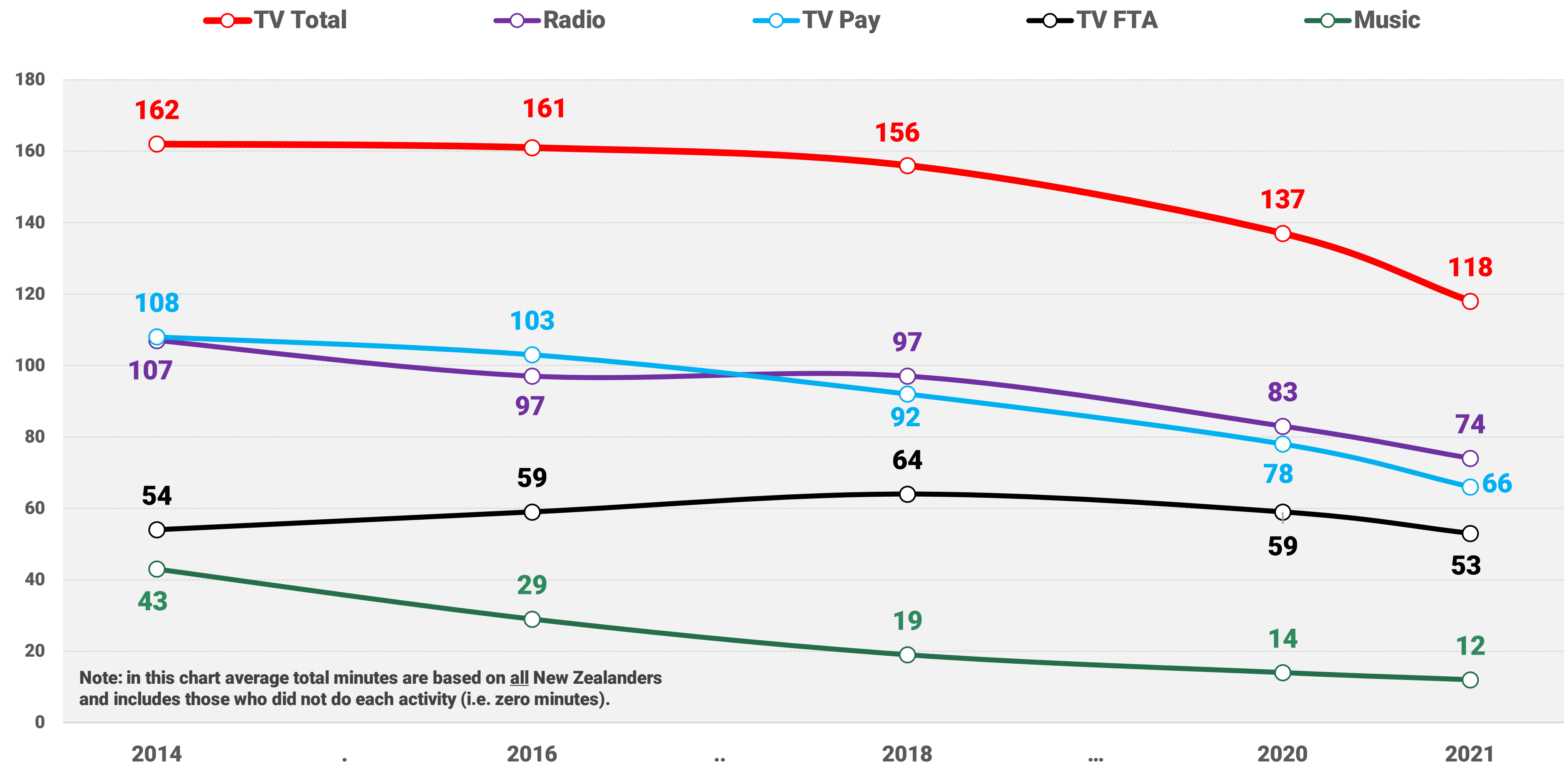
- Streamed music and online gaming are consumed for just under one hour per day.
- On demand is viewed for nearly half an hour a day on average.

Base: All New Zealanders 15+: (2021 n=1,420).

Time spent consuming media. Time spent using all traditional media has declined again in 2021. Time spent watching TV declined for the first time in 2020 and this has accelerated in 2021. This decline is driven by decreased time spent viewing TV via both a pay TV platform and a free to air platform.

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

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



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

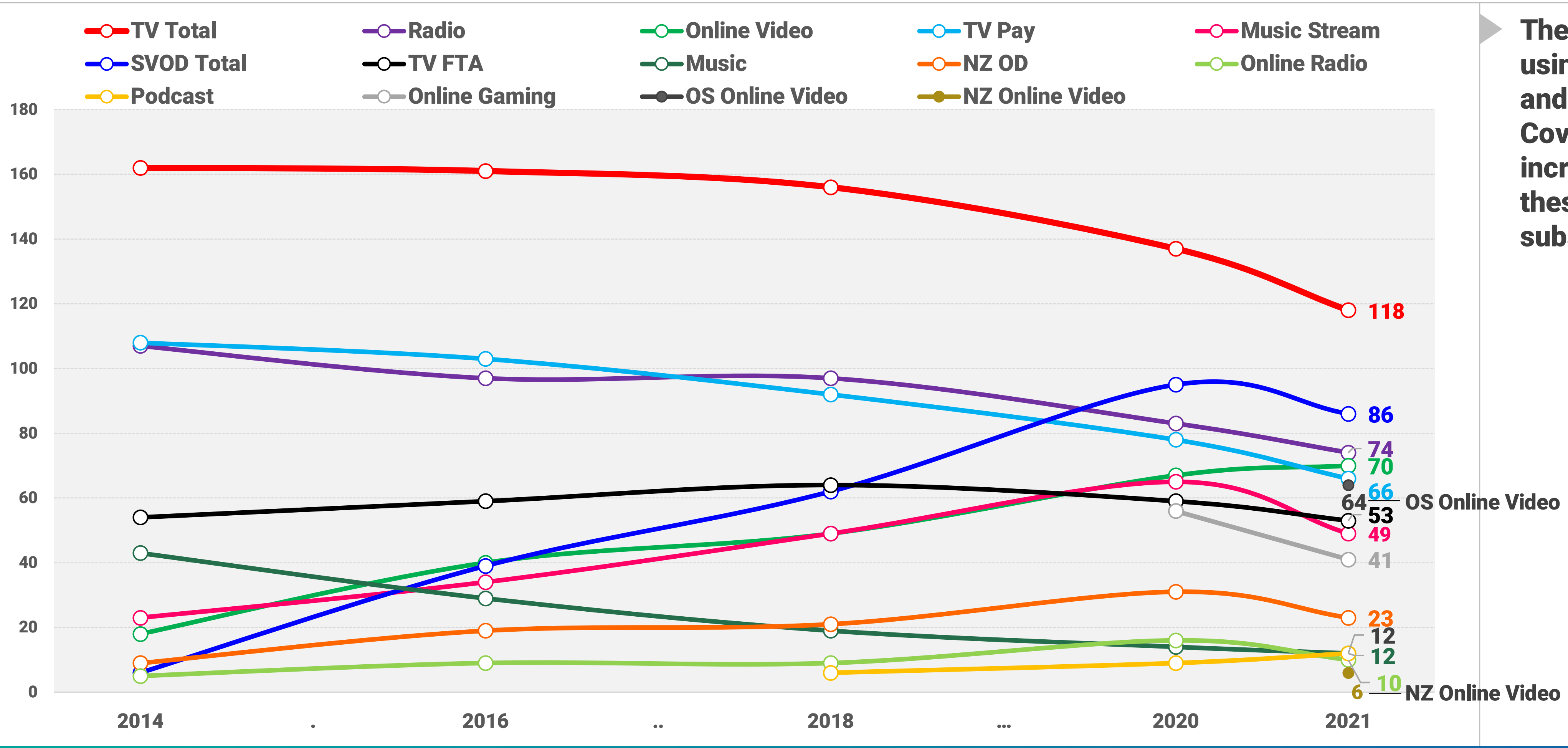
Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Time spent consuming media. Time spent consuming nearly all media has declined in 2021 – with the exception of online video. Time spent watching online video overall is dominated by watching video on overseas sites and apps (64 mins). The shorter time spent watching NZ online video (6 mins) reflects the prevalence of news sites and shorter news videos.

Glasshouse
NZ On Air Irirangi Te Motu

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

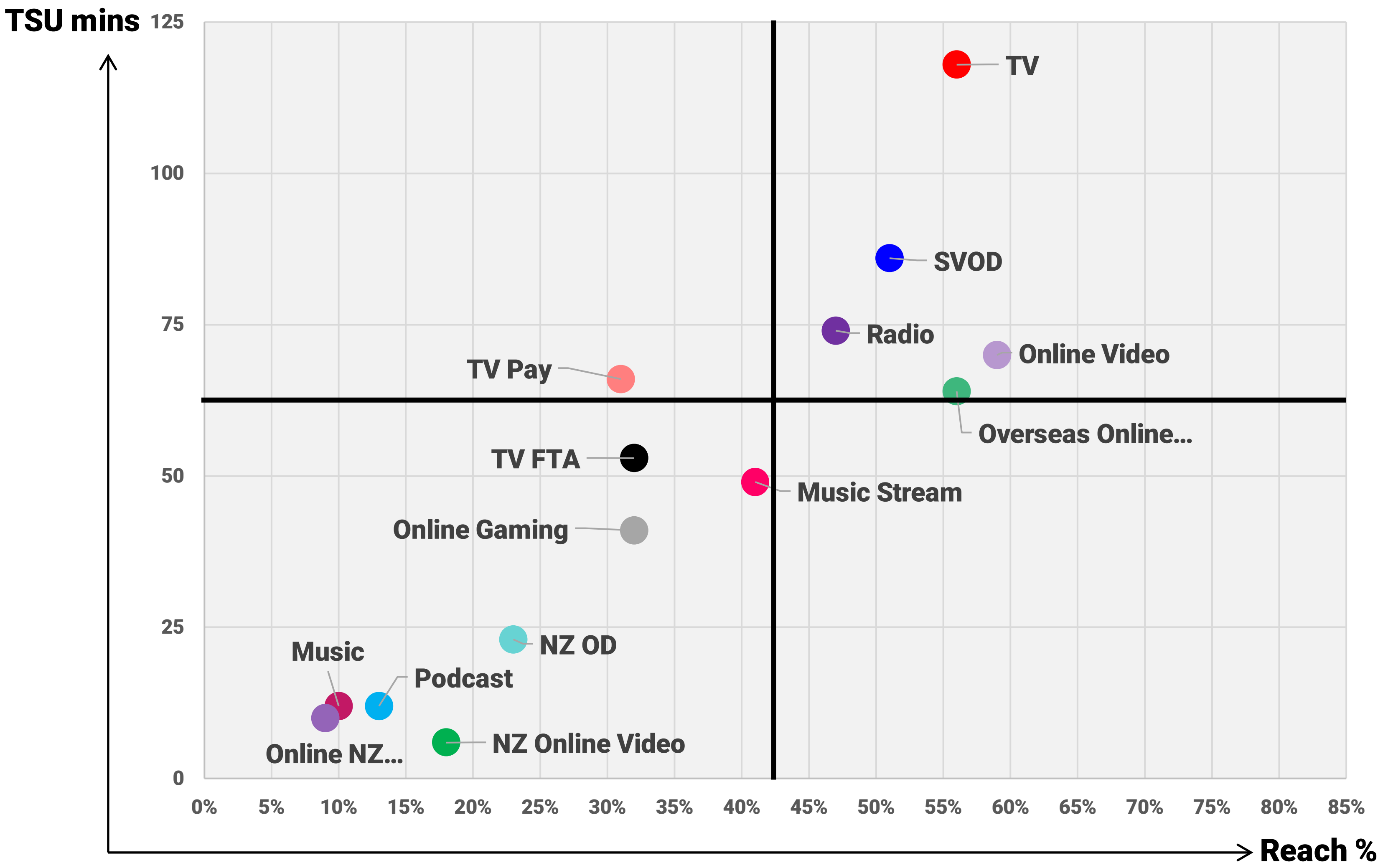
Q: Between (TIME PERIOD) about how long did you do (activity) for?



The declines in time spent using SVOD, streamed music and on demand suggests Covid 19 levels 1 and 2 drove increased engagement with these digital media which has subsequently dropped.

For most media there tends to be a linear relationship between daily audience size and how long New Zealanders watch each media – so as reach increases so does time spent using. The exception is TV viewing which has a higher time spent viewing in relation to its audience size – demonstrating that TV has a greater ability to engage audiences for longer.

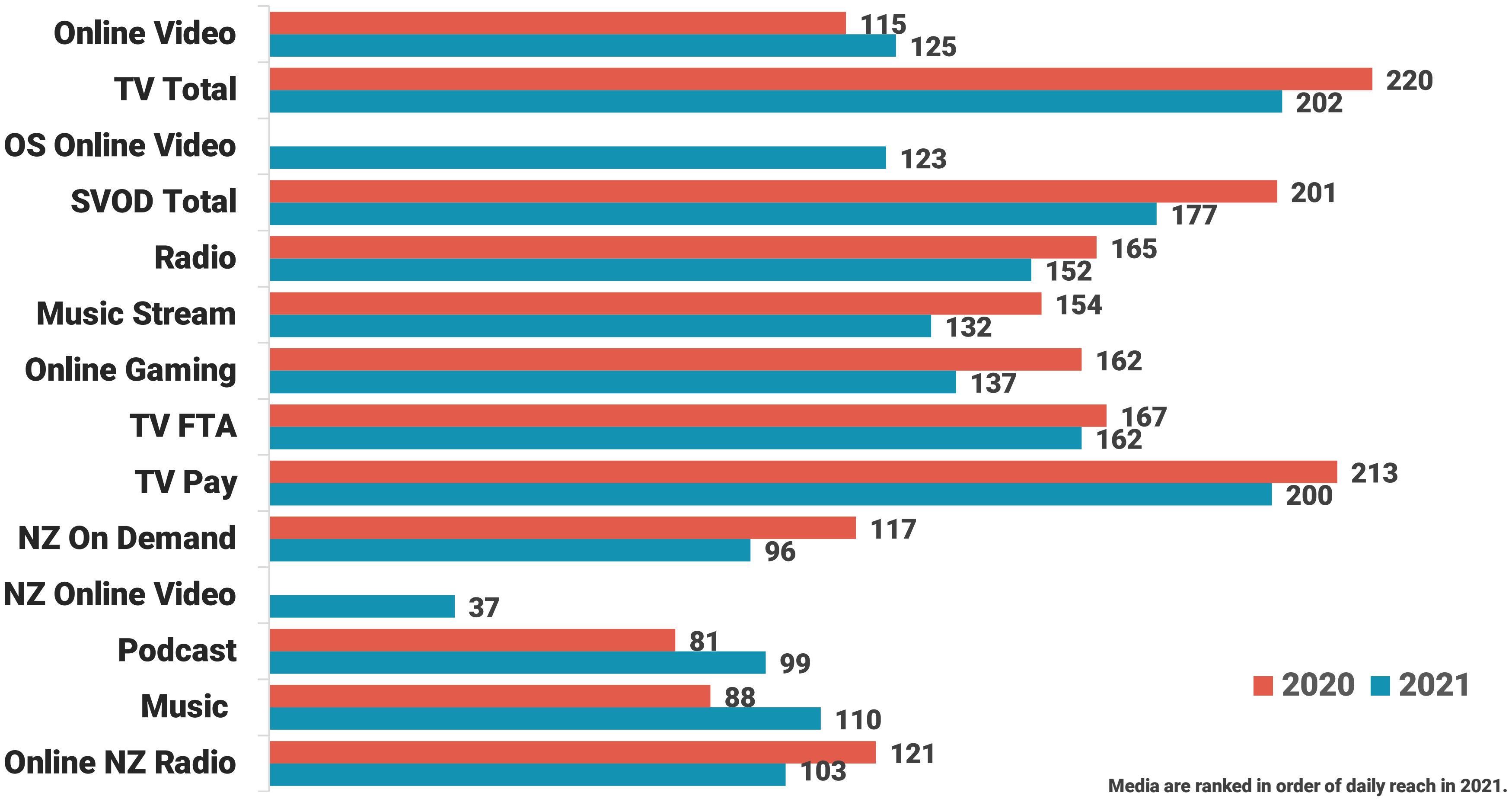
Daily reach of all media & time spent using media 2021. All New Zealanders 15+



This chart summarises the amount of time users of each media spend on those media per day as a measure of engagement (ie. zero viewing is not included). On this measure, despite similar audience sizes, engagement with online video (125 minutes) is significantly lower than TV (202 minutes), SVOD (177 minutes) and radio (152 minutes).

Time spent consuming media 2021 cf. 2020 – average minutes per day. Among all users of each media

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



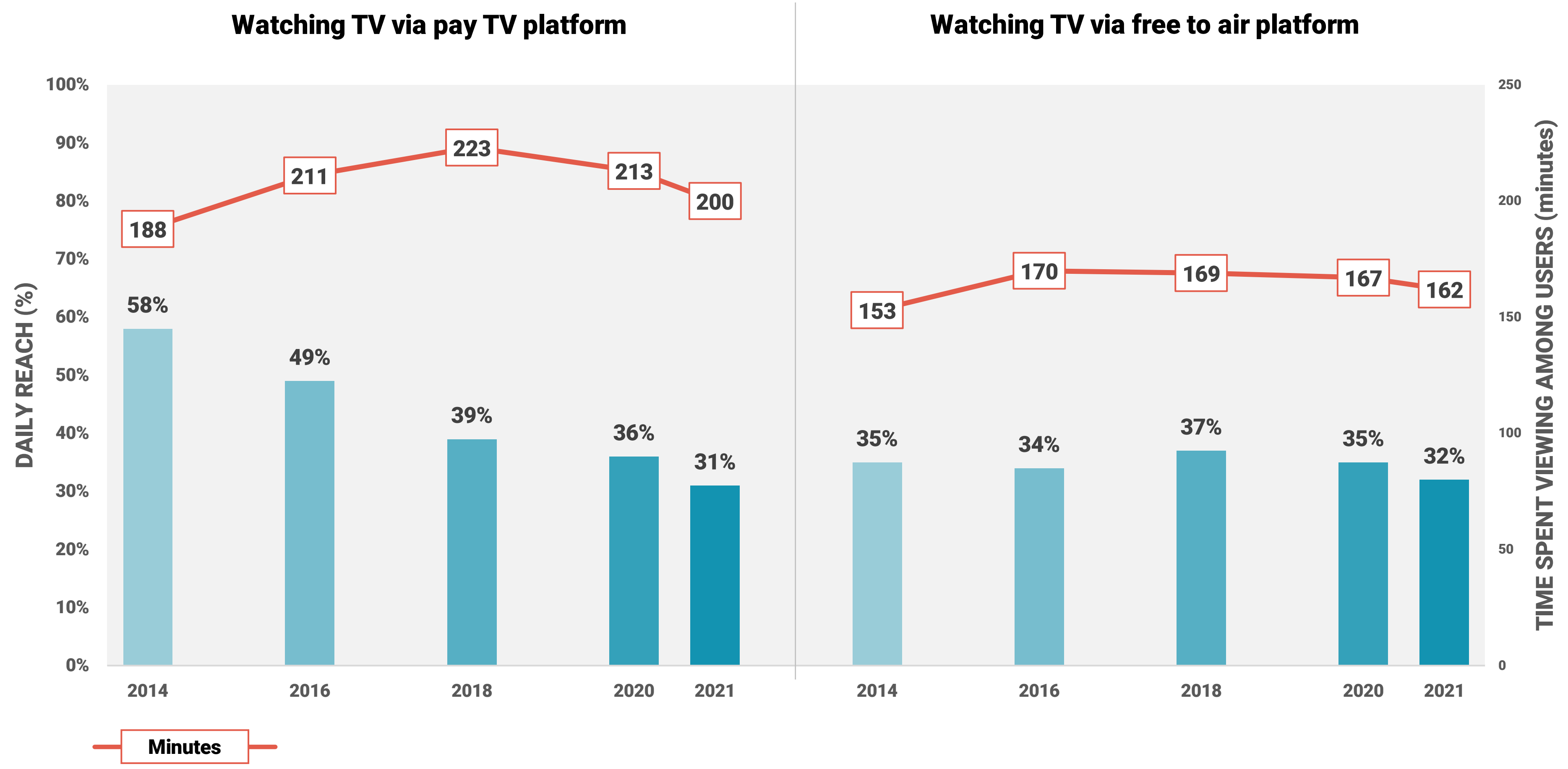
Media are ranked in order of daily reach in 2021.

- With the exception of online video (up from 115 mins), time spent using most media has declined among users since 2020.
- This suggests Covid 19 leels 1 and 2 may have had a bigger influence on engagement than it did on audience size. In other words, these conditions had more impact encouraging existing users to increase their usage of media they already engaged with, and less impact encouraging new users to use new media.

Base: All New Zealanders 15+: (2021 n=1,420).

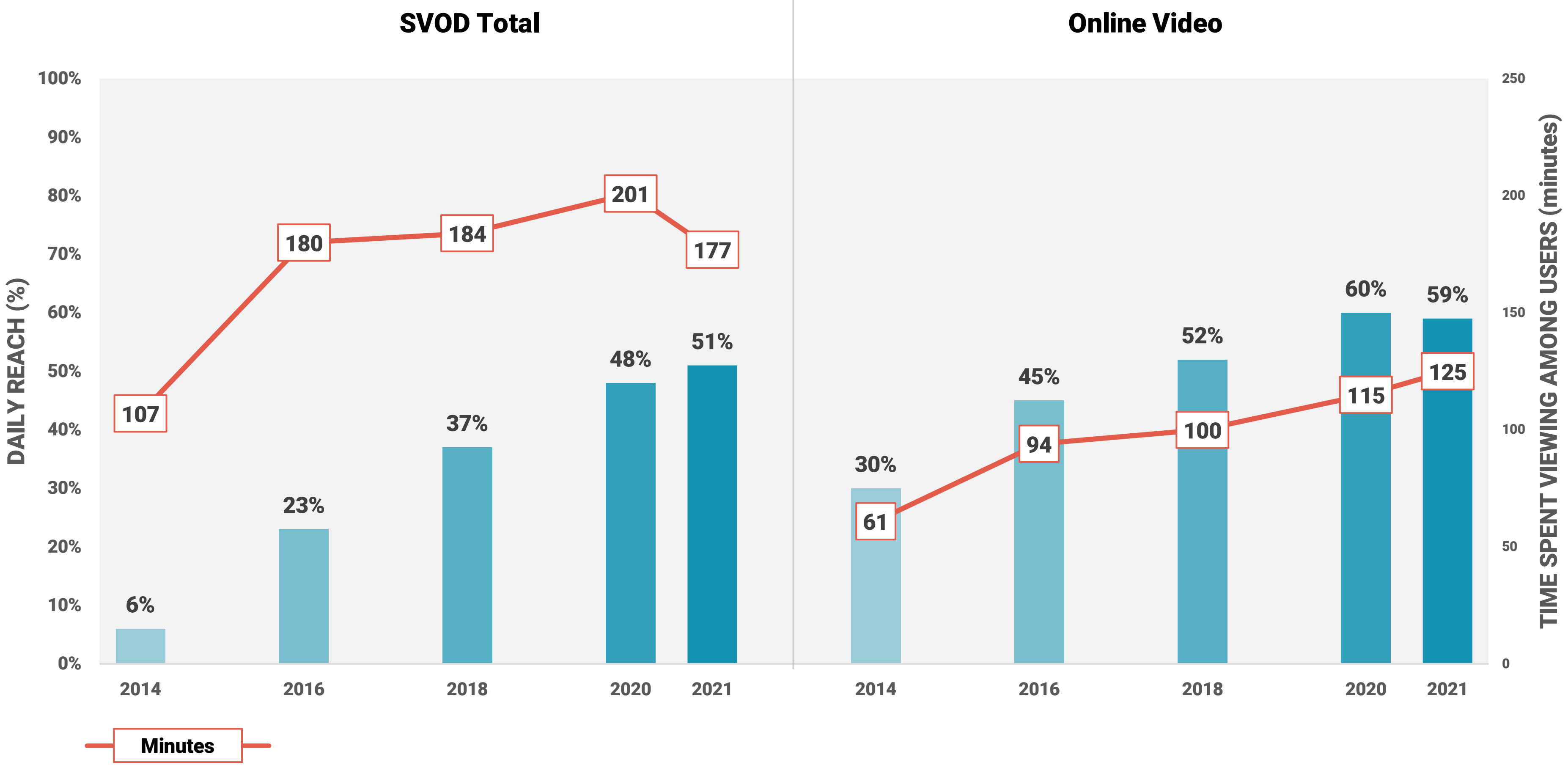
TV audiences are declining due to losing both viewers (ie. reach) and engagement among viewers, particularly from a pay TV platform. Prior to 2020, while reach was declining, engagement grew as heavier viewers remained on the pay TV platform. This is no longer the case as engagement among viewers has declined in 2020 and 2021. Viewing via a free to air platform is more stable.

Total daily reach among all New Zealanders and time spent among users over time – TV



SVOD continues to grow the size of its audience, but for the first time levels of engagement have dropped in 2021 suggesting Covid 19 levels 1 and 2 drove longer than normal viewing of this media. Conversely, growth in audience size has levelled off for online video but levels of engagement continue to increase.

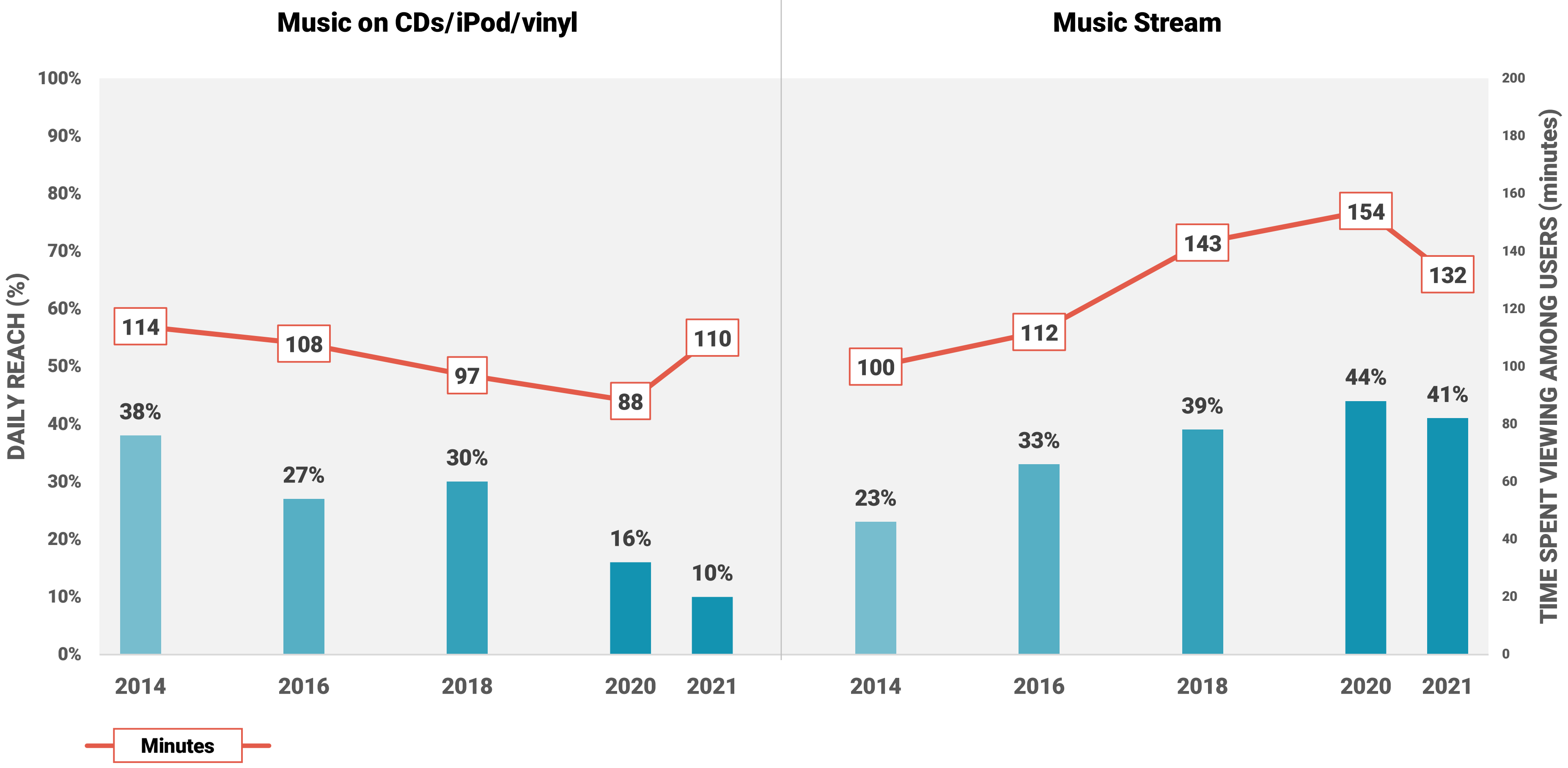
Total daily reach among all New Zealanders and time spent among users over time – video media



Base: REACH | All respondents (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420)
TIME SPENT VIEWING | All users of each media

The number of New Zealanders listening to music on physical formats continues to decline, but the remaining audience is increasingly made up of heavier listeners. The audience listening to streamed music has decreased slightly in 2021, but engagement has declined more significantly suggesting this is also a media whose levels of engagement were boosted by Covid levels 1 and 2.

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



Four times as many New Zealanders now listen to streamed music as opposed to physical formats.

Base: REACH | All respondents (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420)
TIME SPENT VIEWING | All users of each media

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

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

Media watched yesterday (row %'s)	Linear TV	On demand	SVOD	Online Video	Radio	Music Streaming
Linear TV	-	26%	42%	51%	57%	31%
On demand	63%	-	63%	70%	49%	49%
SVOD	47%	29%	-	73%	44%	58%
Online Video	48%	27%	62%	-	44%	57%
Radio	67%	24%	47%	56%	-	34%
Music Streaming	42%	27%	70%	81%	39%	-

Example of how to read table: Of those who watched on demand yesterday, 63% also watched linear TV that day.

Base: All New Zealanders 15+: (2021 n=1,420)

Which New Zealanders are Driving Change?

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

- **Primary Differentiator: Age/Lifestage**
- **Secondary factors:**
  - Socio-economic level
  - Ethnicity
  - Region
- Of these three secondary factors, socio-economic level has the greatest influence and this impact may have increased since 2020.
- In previous studies gender has been a secondary factor impacting media consumption. However in 2021 this influence is less significant, indicating males are more likely to listen to podcasts and streamed music.
- Full profiles of daily media consumption and access to devices and platforms by demographic variables are contained in the Appendix.
- The following charts summarise the complex dynamics of how different variables influence media consumption behaviour in 2021.

There continues to be a generation gap in media consumption between younger and older New Zealanders. However as media consumption trends evolve the divide is becoming more of a continuum, and the age at which behaviour changes varies by different media.

- **In 2016 there was a stark divide at ages 40-45 between younger New Zealanders who were more likely to engage with digital media and older New Zealanders more likely to use traditional media.**
- **In 2018 that generation gap remained strong, especially for traditional media as younger New Zealanders continued to drop out of those media. However the generation gap had closed a little for digital media as older New Zealanders adopted those media in greater numbers.**
- **There is no longer a single divide between younger and older audiences who are more or less likely to consume traditional or digital media. For most media it is now more accurate to say there are three generations of media consumers; a young audience where digital media dominates, a middle aged audience more divided between traditional and digital media, and a much older audience among whom traditional media still dominates.**
- **This three generation landscape is a result of middle aged New Zealanders continuing to reduce their use of traditional media and adopting digital media in greater numbers.**
- **The ages which define these three audiences varies between media, and are summarised on the next page.**

The ages of the three generations of media consumers vary by media, with the middle generation typically being defined between a broad age range of 40 and 59.

Defining daily media audiences by age

Media			
TV	Less viewing 15-39s	Average use 40-49s	More viewing 50+
SVOD	More viewing 15-44s	Average 45-59s	Less viewing 60+
Radio	Less listening 15-44s	Average 45-59s	More listening 60+
Online Video	More viewing 15-39s	Average 40-59s	Less viewing 60+
Music Streaming	More listening 15-39s	Average 40-44s	Less listening 45+
Podcasts	More listening 15-29s	Average 30-59s	Less listening 60+
Gaming	More playing 15-24s	Average 25-54s	Less playing 55+

There is one exception to the three generations of media behaviour:

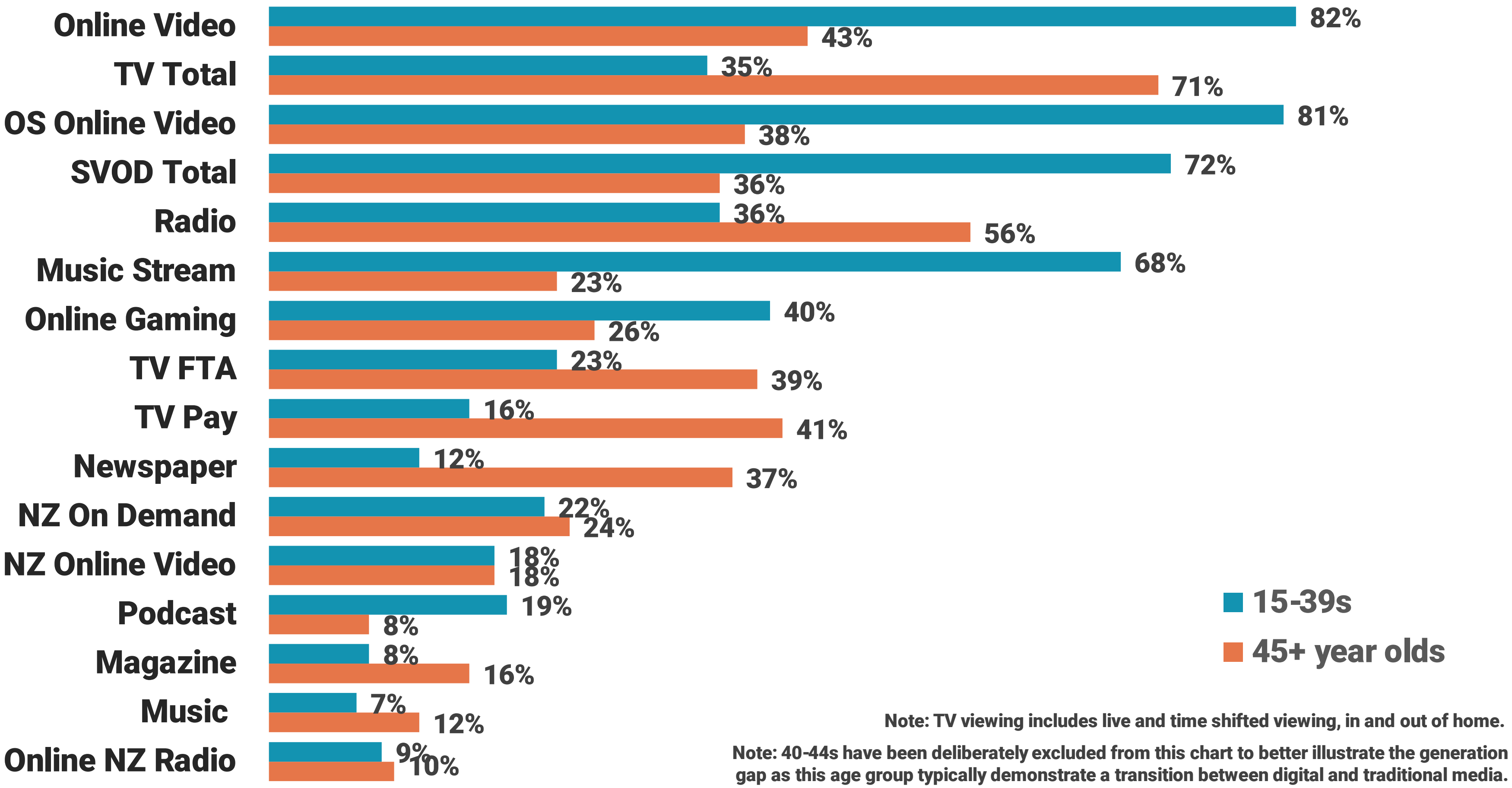
- **the on demand audience remains broad with no clear generation gap – the biggest audiences are aged 40-59.**

The combination of TV based content and a digital channel means this media appeals relatively equally to younger, more digitally savvy audiences, as well as older, more traditional TV audiences.

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

Daily reach of all media 2021 – 15-39s vs. 45+ year olds

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



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

Note: 40-44s have been deliberately excluded from this chart to better illustrate the generation gap as this age group typically demonstrate a transition between digital and traditional media.

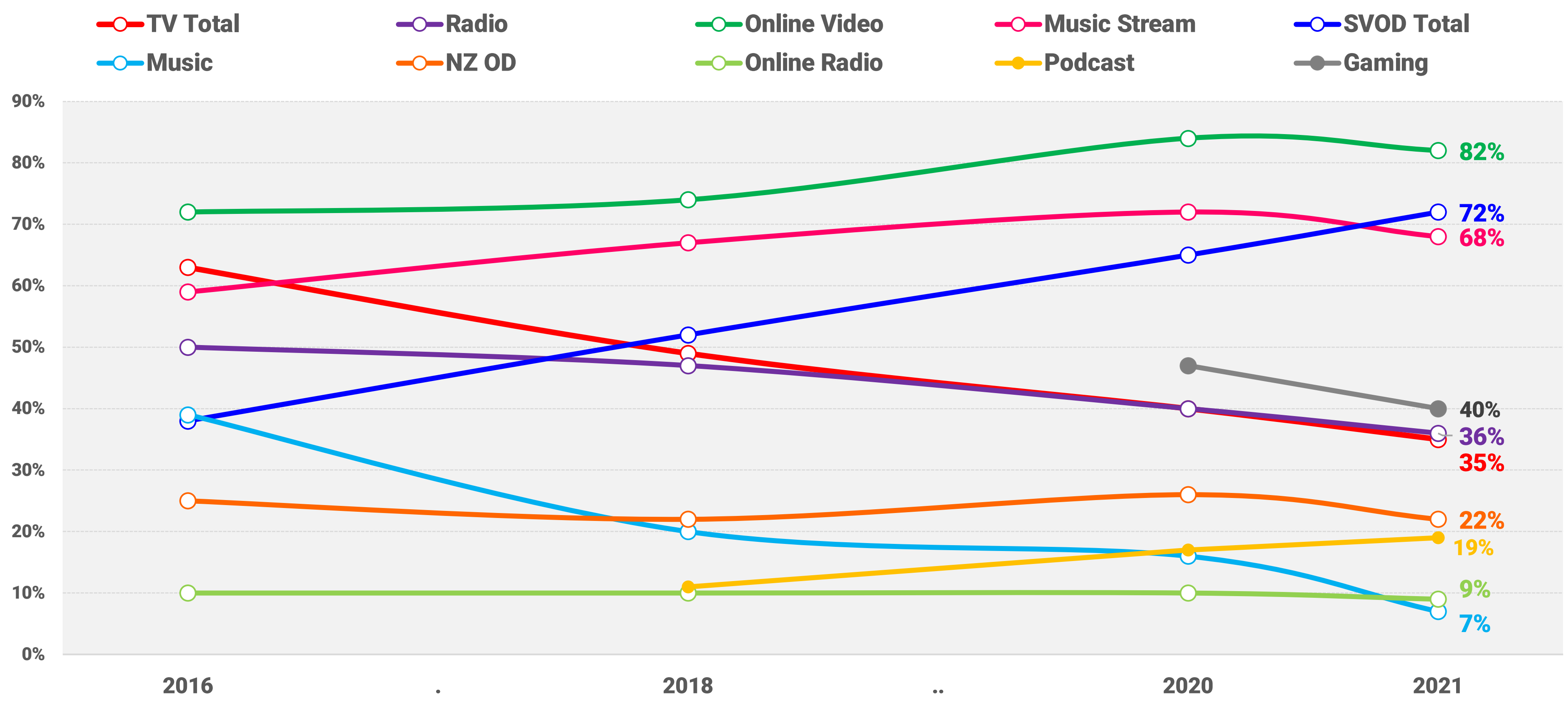
- Among 15-39s, overseas online video (82%), SVOD (72%), and music streaming (68%) attract the biggest daily audiences by a significant margin - followed by gaming (41%).
- Among 45+ year olds TV (71%), radio (56%) attract the biggest audiences on a daily basis, but followed by online video (43%) and newspapers (37%).
- On demand, NZ online video and online NZ radio attract similar sized audiences across these two age groups.

Base: All 15-39s (n=587), all 45+ year olds (n=833)

How is the media consumption of 15-39 year old New Zealanders changing over time? Digital media captures the vast majority of younger New Zealanders each day with online video attracting the biggest audience. SVOD has continued to grow and this audience is now bigger than streamed music among 15-39s each day.

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

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



- Traditional media has continued to decline with TV and radio now reaching approximately one third of 15-39s each day.
- Audiences using all media except SVOD and podcasts have declined slightly since 2020.

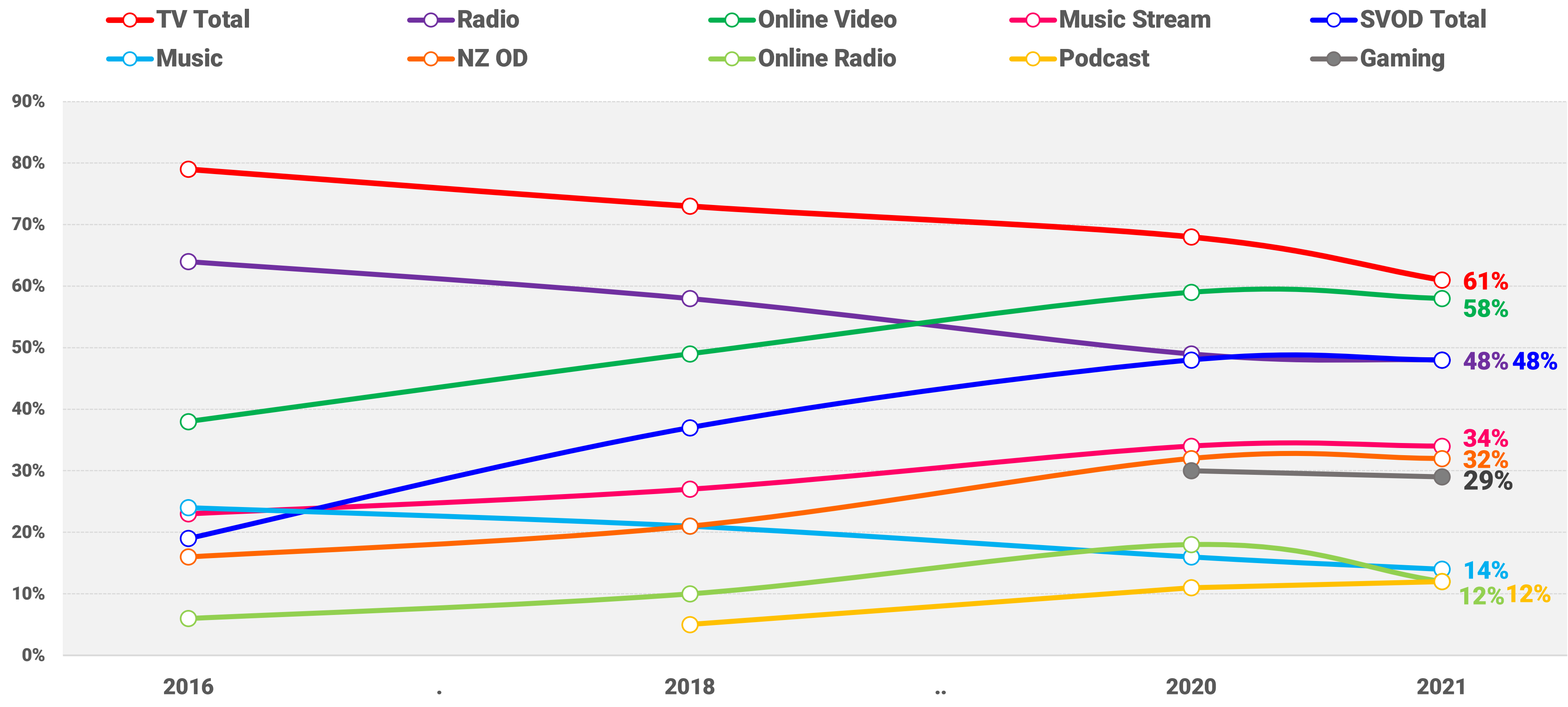
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All respondents: (2016 n=576; 2018 n=577; 2020 n=630; 2021 n=587).

How is the media consumption of 40-59 year old New Zealanders changing over time?
TV still attracts the biggest daily audience among 40-59s, but the ongoing decline in TV means its audience is only slightly larger than online video. Audiences using nearly all media are stable since 2020 resulting in digital and traditional media remaining at the cross-over point among 40-59s.

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

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

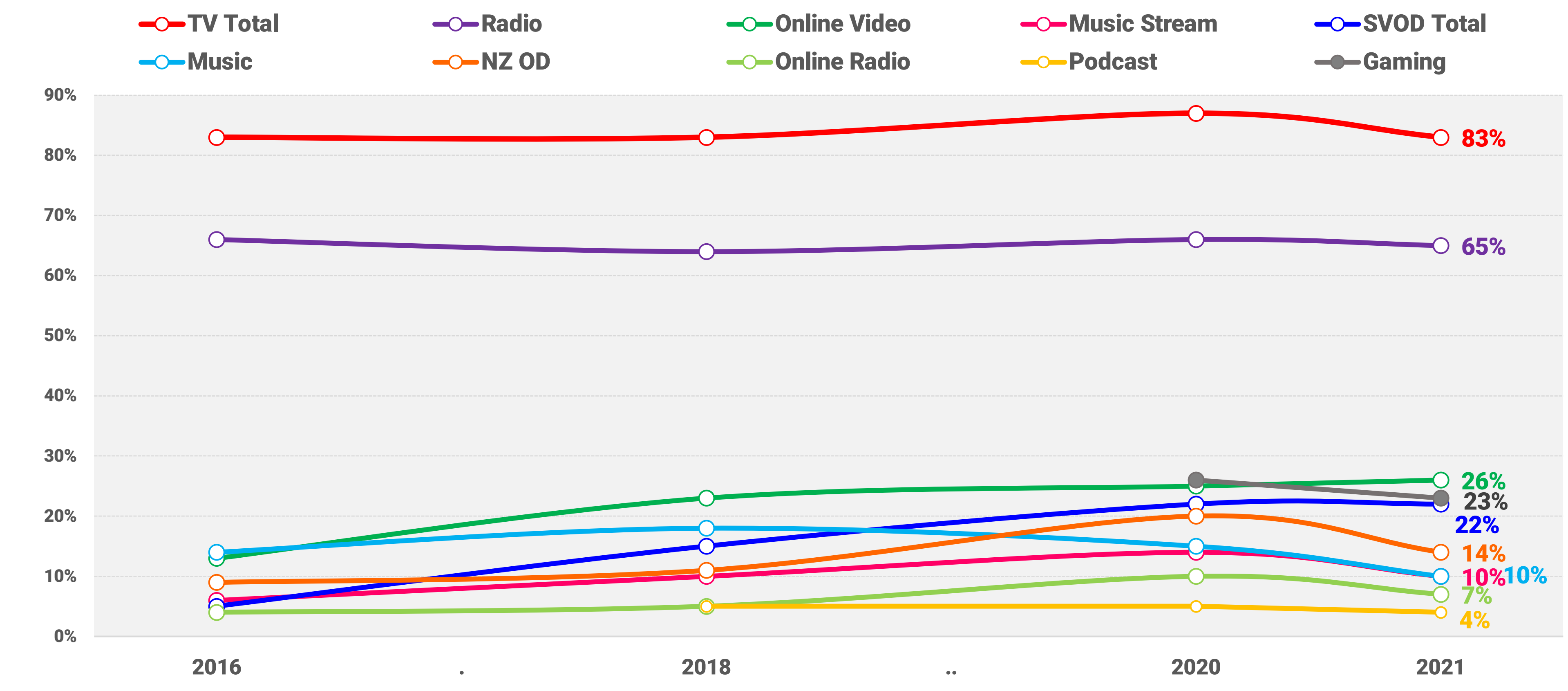


Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

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

Daily reach of media over time – 60+ year olds

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



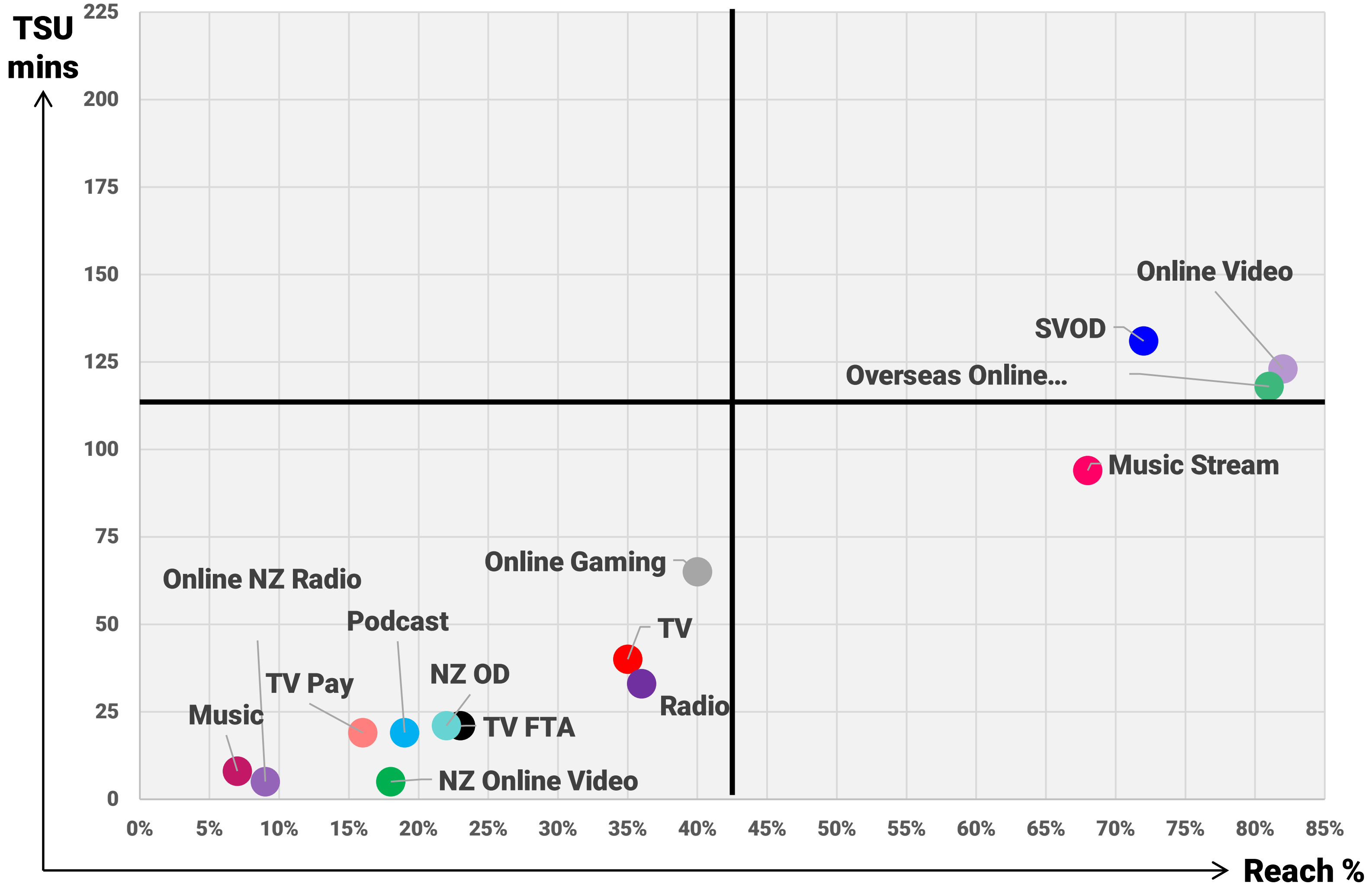
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

- The vast majority of 60+ year old New Zealanders tune in to TV and/or radio each day and this audience has not declined since 2016.
- Online video attracts the third biggest audience but reaches only one in four and this has not increased since 2018.
- SVOD attracts more than one in five 60+ New Zealanders, and this has not grown significantly since 2020.
- On demand has declined significantly since 2020 among 60+ year olds.

Base: All respondents: (2016 n=363; 2018 n=377; 2020 n=418; 2021 n=382).

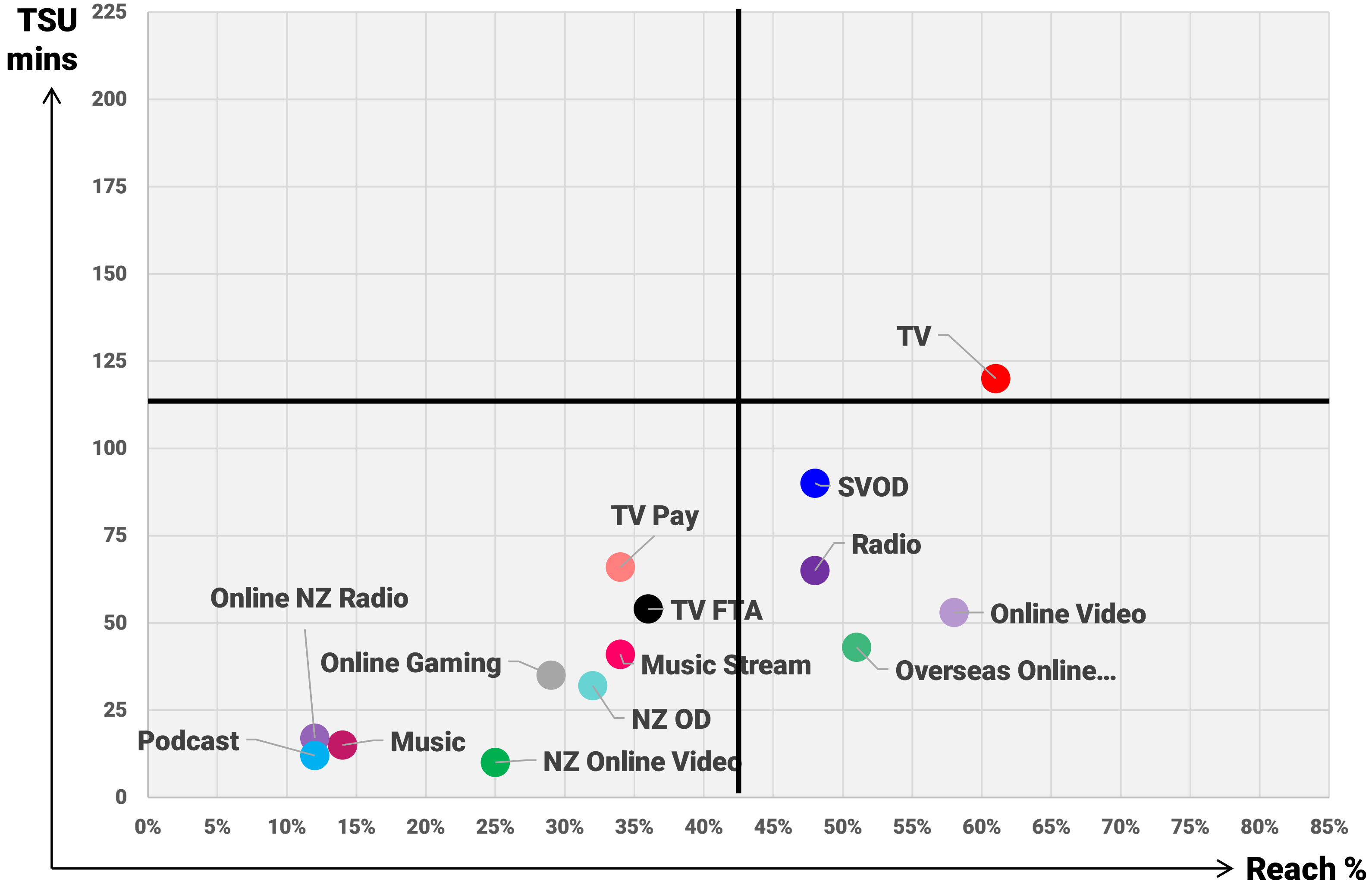
This chart shows that online video, SVOD and streamed music not only attract the biggest audiences among 15-39s but that they also dedicate the most time to these media by a significant margin. With the exception of gaming, 15-39s spend no more than 40 minutes on any other media.

Daily reach of all media & time spent using media 2021. All aged 15-39.



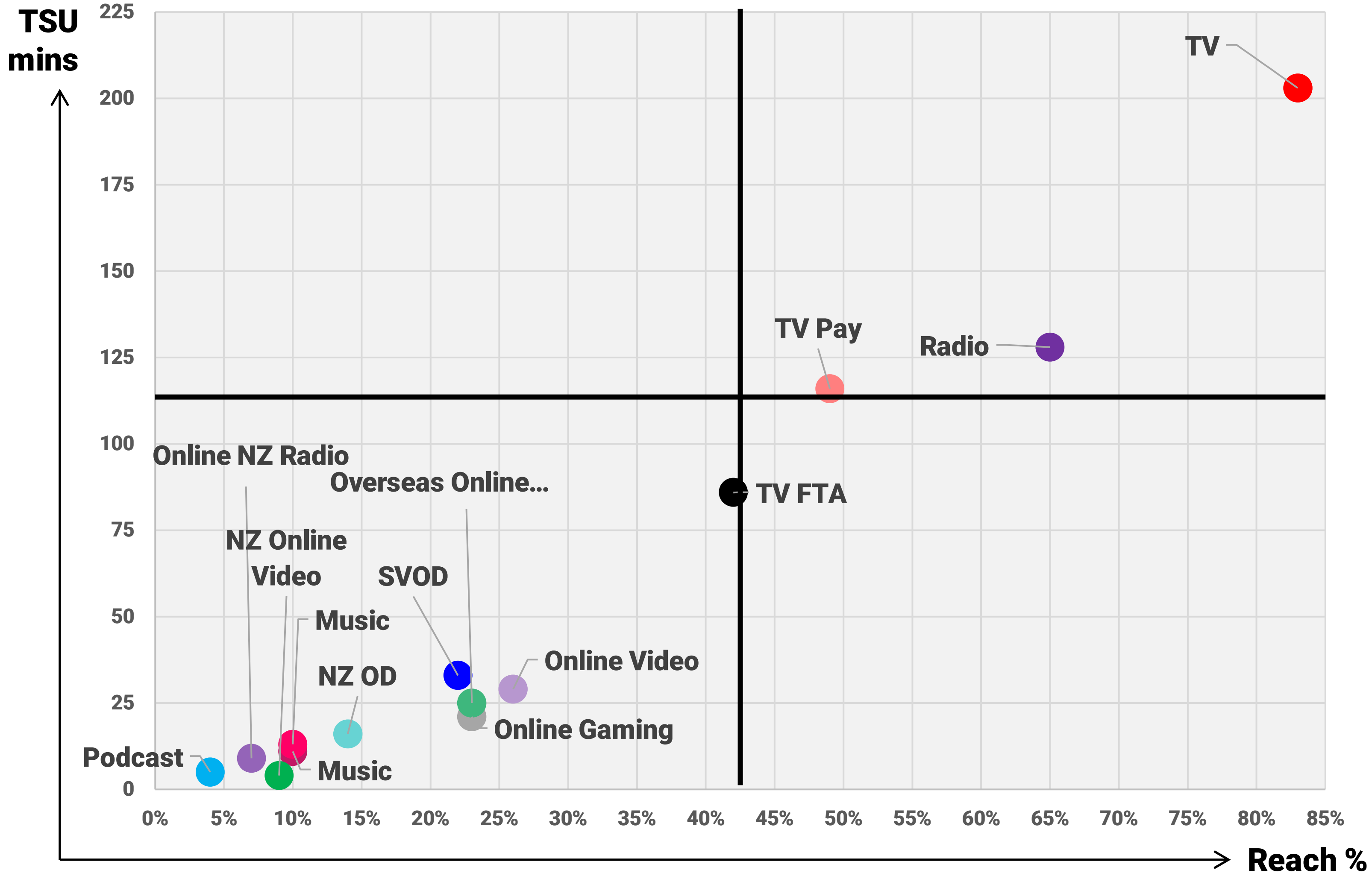
While TV attracts only a slightly bigger audience than online video among 40-59s, this group spend significantly more time watching TV. Compared to 15-39s and 60+ year olds this age group split their time between a wider range of digital and traditional media.

Daily reach of all media & time spent using media 2021. All aged 40-59.



This older group watch TV and listen to the radio in both large numbers and for long periods of time each day. This older age group dedicate no more than 33 minutes to any other media.

Daily reach of all media & time spent using media 2021. All aged 60+.



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

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

Secondary factors also influence the consumption of media and access to devices and platforms but these trends are less strong and less consistent than the effect of age/lifestage. These trends are summarised below, with a full breakdown contained in the Appendix.

Socio-economic level*

- **This is the second most influential factor after age/lifestage and there are indications the impact of this factor has increased since 2020.**
- **Higher socio-economic groups are more likely to use on demand, SVOD and listen to the radio (broadcast and online) each day. This group is also more likely to have access to subscription based platforms such as SKY TV and SVOD, as well as a PVR, a TV, a radio, a smart TV connected to the Internet, and Chromecast or similar.**
- **Conversely lower socio-economic groups are less likely to watch SVOD or listen to streamed music. This group are less likely to have access to SKY TV, a smart TV connected to the Internet, a radio, Chromecast or similar, or gaming console.**

Region

- **Aucklanders are more likely to engage with digital media overall than the rest of the country.**
- **In particular this region is more likely to watch SVOD (56%) and online video (65%). They are more likely to have access to a smart TV connected to the Internet (52%) and a games console (31%). They are less likely to watch TV (49%), or have access to a working radio (55%) or SKY TV (26%).**

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

Secondary factors also influence the consumption of media and access to devices and platforms but these trends are less strong and less consistent than the effect of age/lifestage. These trends are summarised below, with a full breakdown contained in the Appendix.

Ethnicity

- New Zealanders of Asian descent are significantly less likely to watch TV (38% daily reach) or listen to broadcast radio (37%), and more likely to watch online video (84%) or SVOD (68%) and listen to streamed music (64%).
- Asian ethnicities are significantly less likely to have access to a TV (65%), a radio (39%) or PVR (14%), and just 13% have SKY TV.
- Māori are more likely to play online gaming (40%). They are also more likely to have access to SKY TV (39%), a PVR (32%), a radio (66%) or a games console (33%).
- Pasifika are more likely to watch SVOD (63%) and online video (72%), listen to streamed music (55%), and play online gaming (43%). They are also more likely to have access to a games console (35%), and less likely to listen to the radio (35%) or have access to a radio (47%).

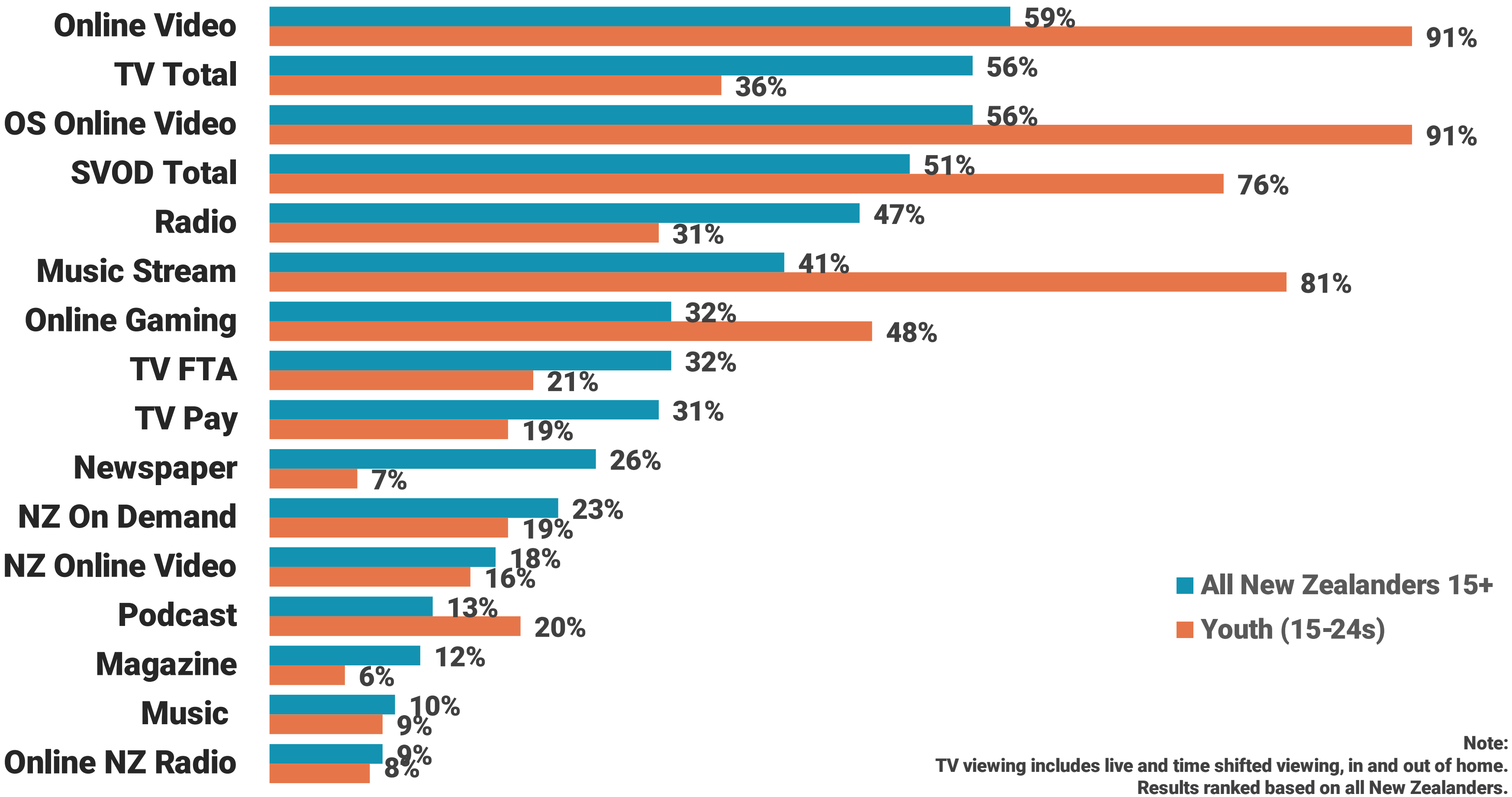
Hard To Find Audiences

Youth (15-24s)
Māori
Pasifika
Asian

This chart shows how different the media behaviour of 15-24s is from the average in 2021. Nearly all 15-24s watch online video and this is dominated by overseas online video. Three quarters watch SVOD, eight in ten listen to streamed music, and one in two play online gaming.

Daily reach of all media 2021 – Youth (15-24s)

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



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

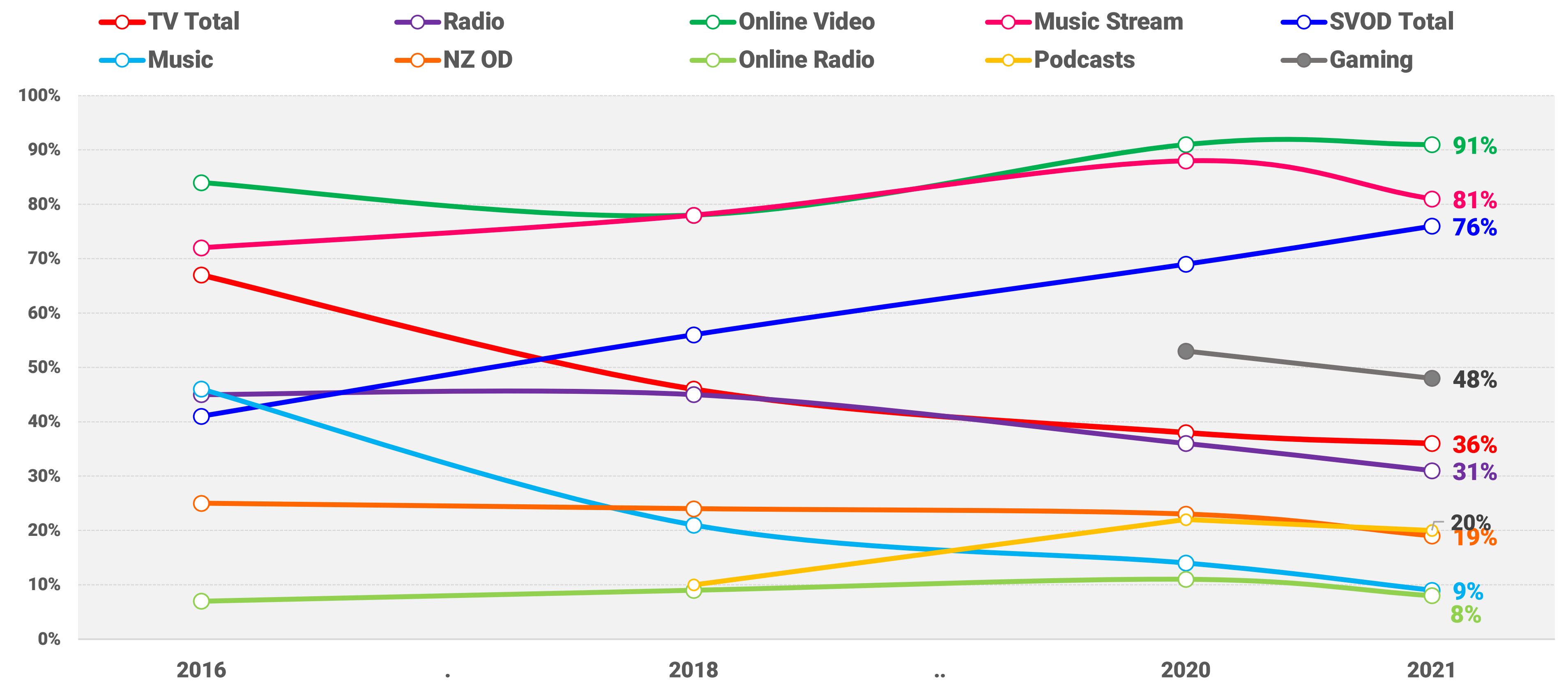
- TV and radio are the most widely used traditional media but these media only reach about one third of 15-24s each day.
- On demand, NZ online video, music on physical formats and online NZ radio are the only media where the consumption patterns of 15-24s are similar to that of the general population.

Base: All New Zealanders 15+ (n=1,420); All 15-24s (n=251).

SVOD is the only media to have grown its audience among 15-24s since 2020. Online video audiences are stable, but audiences on all other media have declined slightly among 15-24s since 2020 – although streamed music has declined more significantly.

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

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



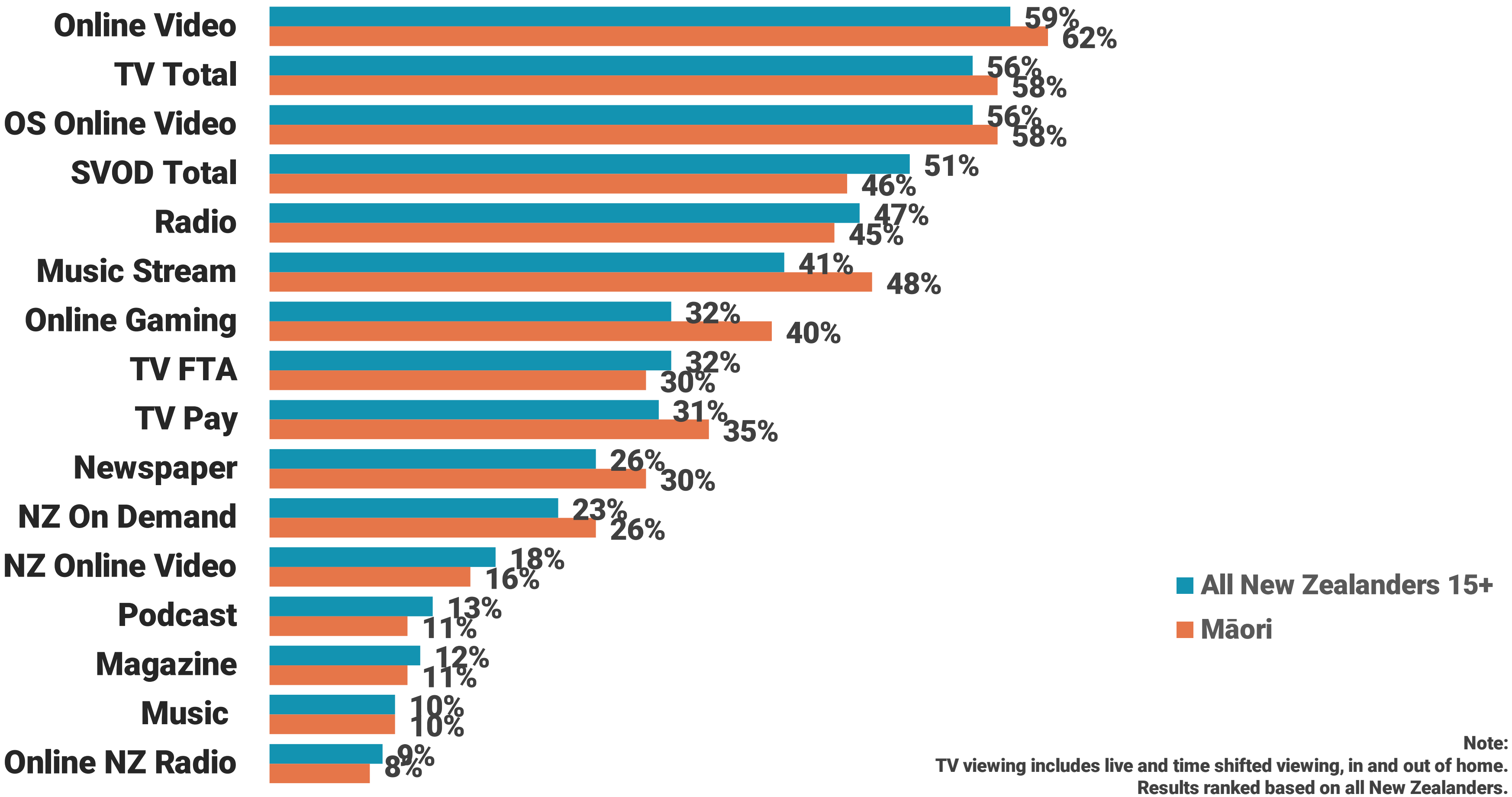
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All 15-24s: (2016 n=249; 2018 n=264; 2020 n=262; 2021 n=251).

There is similarity in the media consumption of Māori and all New Zealanders 15+ with online video attracting the biggest audience narrowly over TV. The biggest difference compared to all New Zealanders 15+ are smaller audiences watching SVOD, and larger Māori audiences listening to streamed music and playing online gaming.

Daily reach of media 2021 – Māori

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



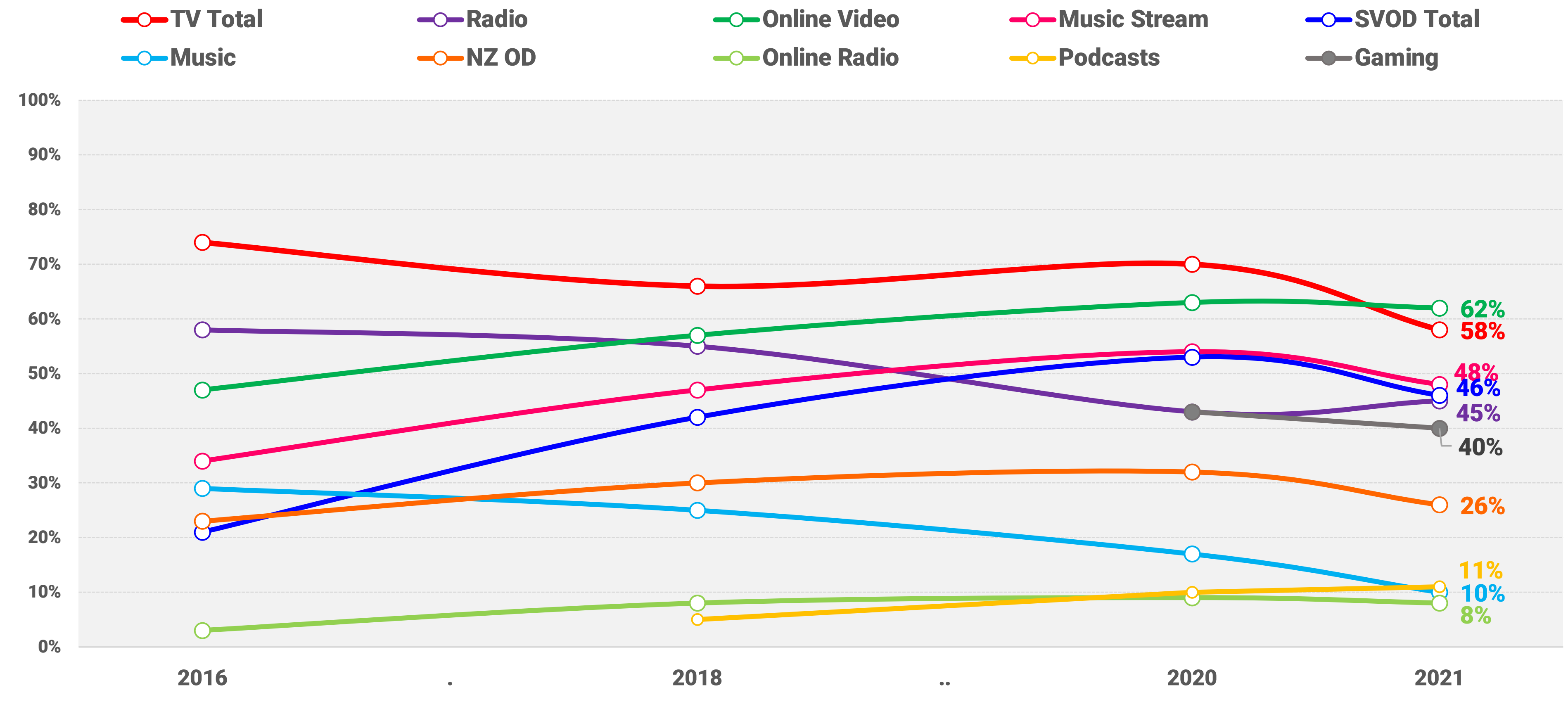
Note:
TV viewing includes live and time shifted viewing, in and out of home.
Results ranked based on all New Zealanders.

Base: All New Zealanders 15+ (n=1,420); All Māori (n=231).

There has been a significant decline in TV viewing among Māori since 2020, resulting in online video attracting the biggest daily audience among Māori. There have been smaller declines in the Māori audience watching SVOD and on demand, and listening to streamed music. Radio and podcasts show increased audiences since 2020.

Daily reach of media over time – Māori

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

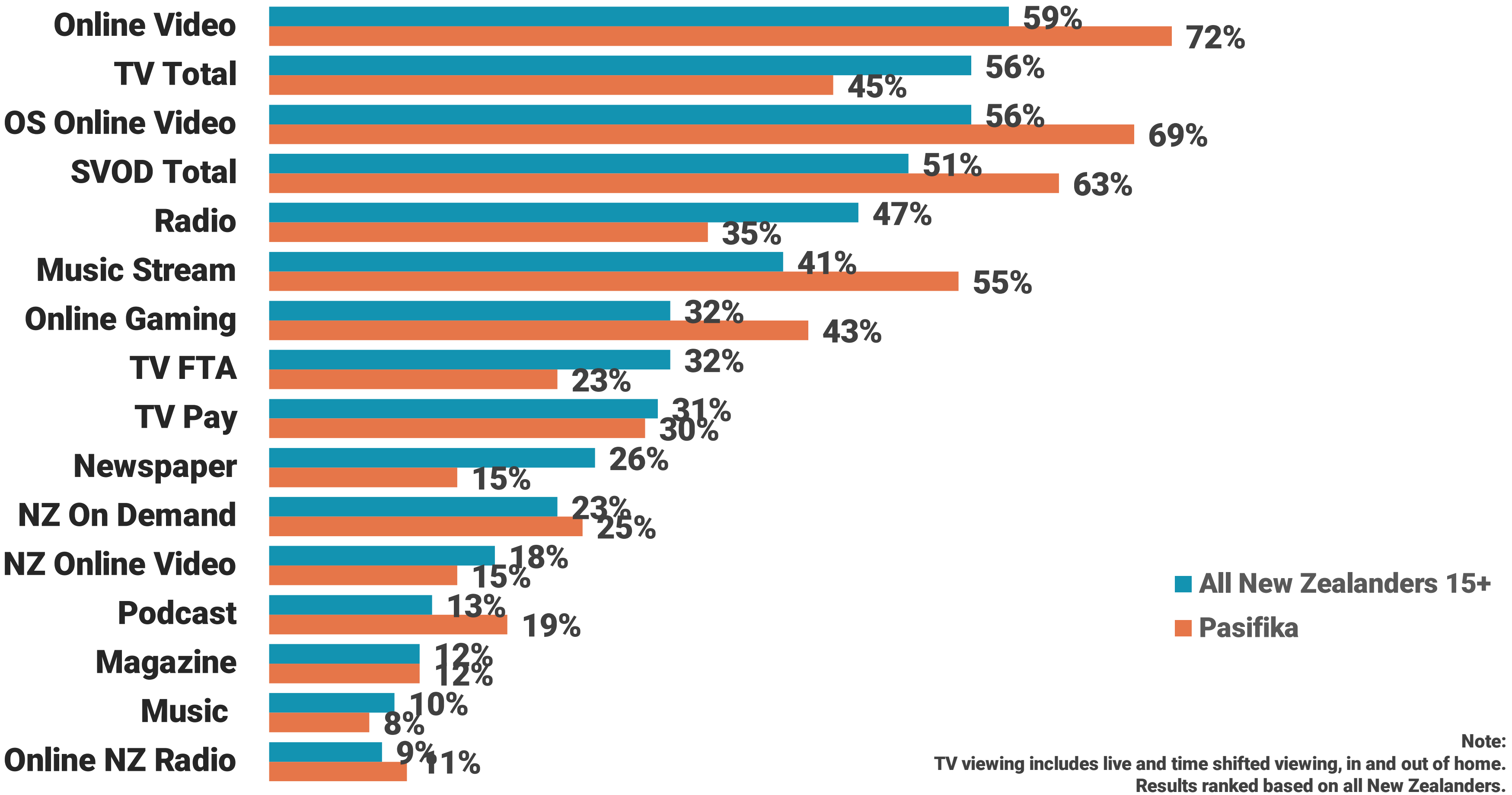


Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

The overall media behaviour among Pasifika more closely resembles the behaviour of 15-24s with online video reaching more than seven in ten Pasifika each day and streamed music and SVOD reaching six in ten. Online gaming and TV attract the next biggest audiences, reaching four in ten Pasifika daily.

Daily reach of all media 2021 – Pasifika*

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



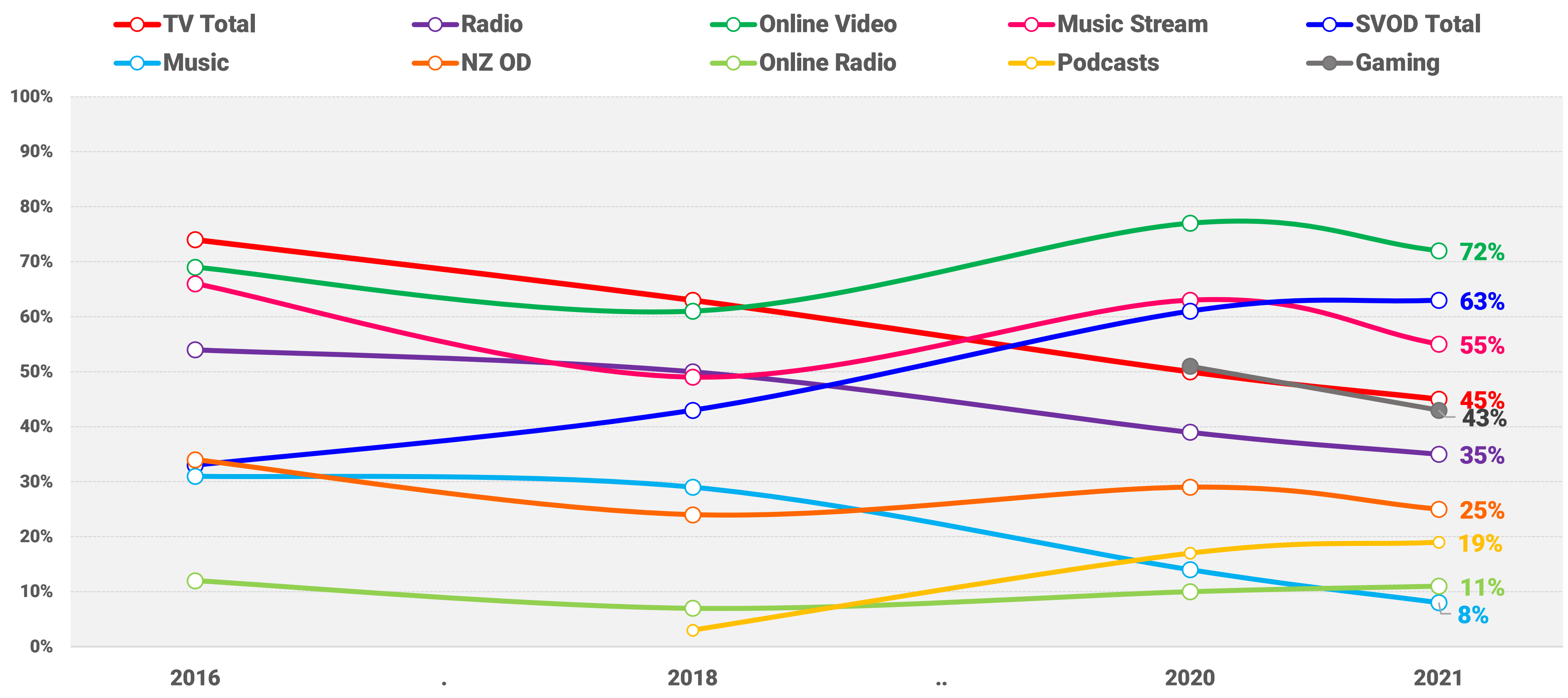
Note:
TV viewing includes live and time shifted viewing, in and out of home.
Results ranked based on all New Zealanders.

Base: All New Zealanders 15+ (n=1,420); All Pasifika* (n=105). * Caution: small sample size

With the exception of slight growth in audiences using SVOD, podcasts and online radio, Pasifika audiences using all media have declined slightly in 2021. SVOD now clearly reaches the second most Pasifika after online video.

Daily reach of all media over time – Pasifika*

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



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

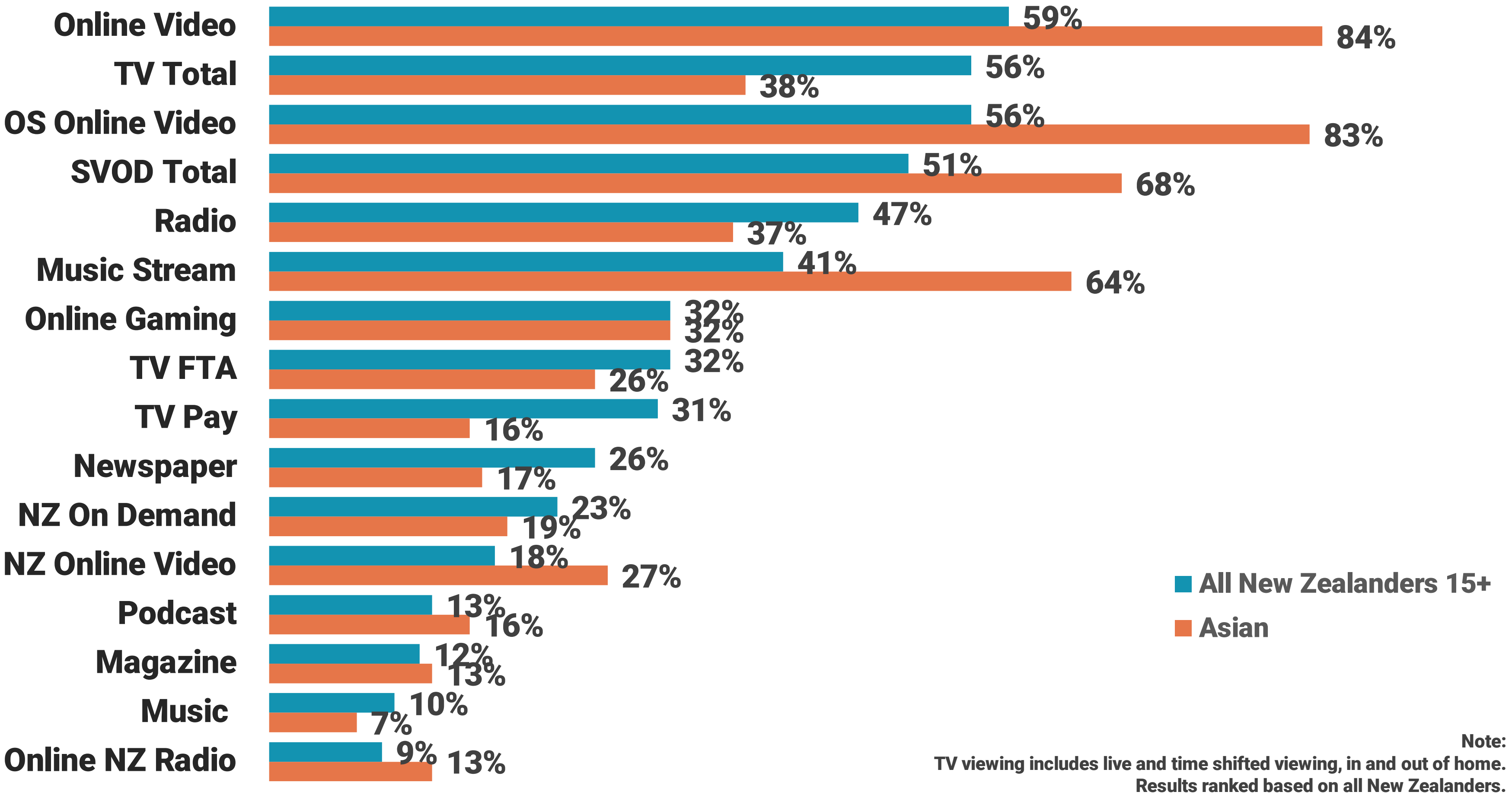
Note: TV viewing includes live and time shifted viewing, in and out of home. Online gaming only included in 2020.

Base: All Pasifika*: (2016 n=83; 2018 n=86; 2020 n=110; 2021 n=105). * Caution: small sample sizes

As with 15-24s, Asian New Zealanders exhibit very different media behaviour compared to overall New Zealanders 15+. Asian audiences are significantly less likely to watch TV or listen to the radio, and significantly larger audiences watch online video (including NZ online video) and SVOD, and listen to streamed music.

Daily reach of all media 2021 – Asian

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



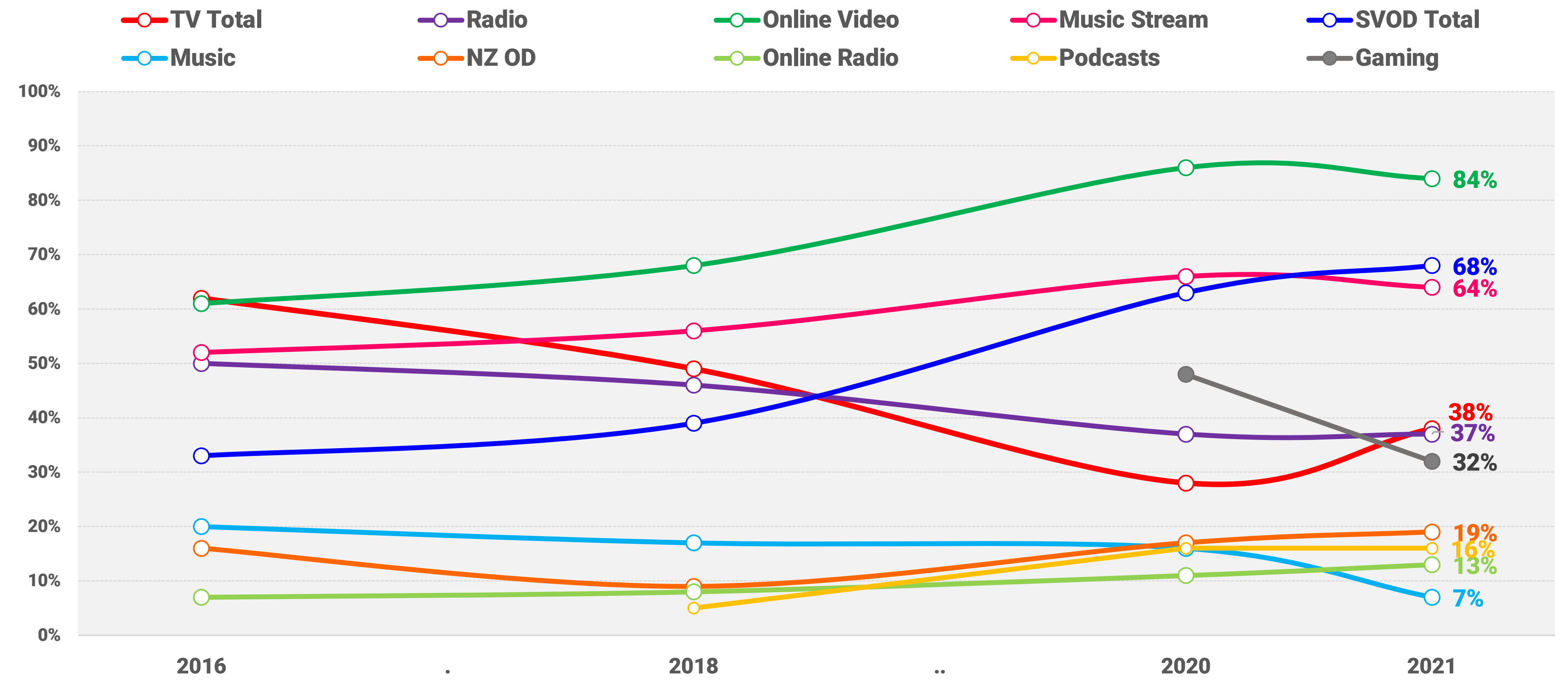
Note:
TV viewing includes live and time shifted viewing, in and out of home.
Results ranked based on all New Zealanders.

Base: All New Zealanders 15+ (n=1,420); All Asian (n=202).

The decline in TV viewing has halted and in fact TV audiences have grown among Asian New Zealanders since 2020. With the exception of a decline in gaming, audiences are relatively stable for other media among Asian audiences with a clear gap between the sizes of audiences using digital versus traditional media.

Daily reach of all media over time – Asian

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



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

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

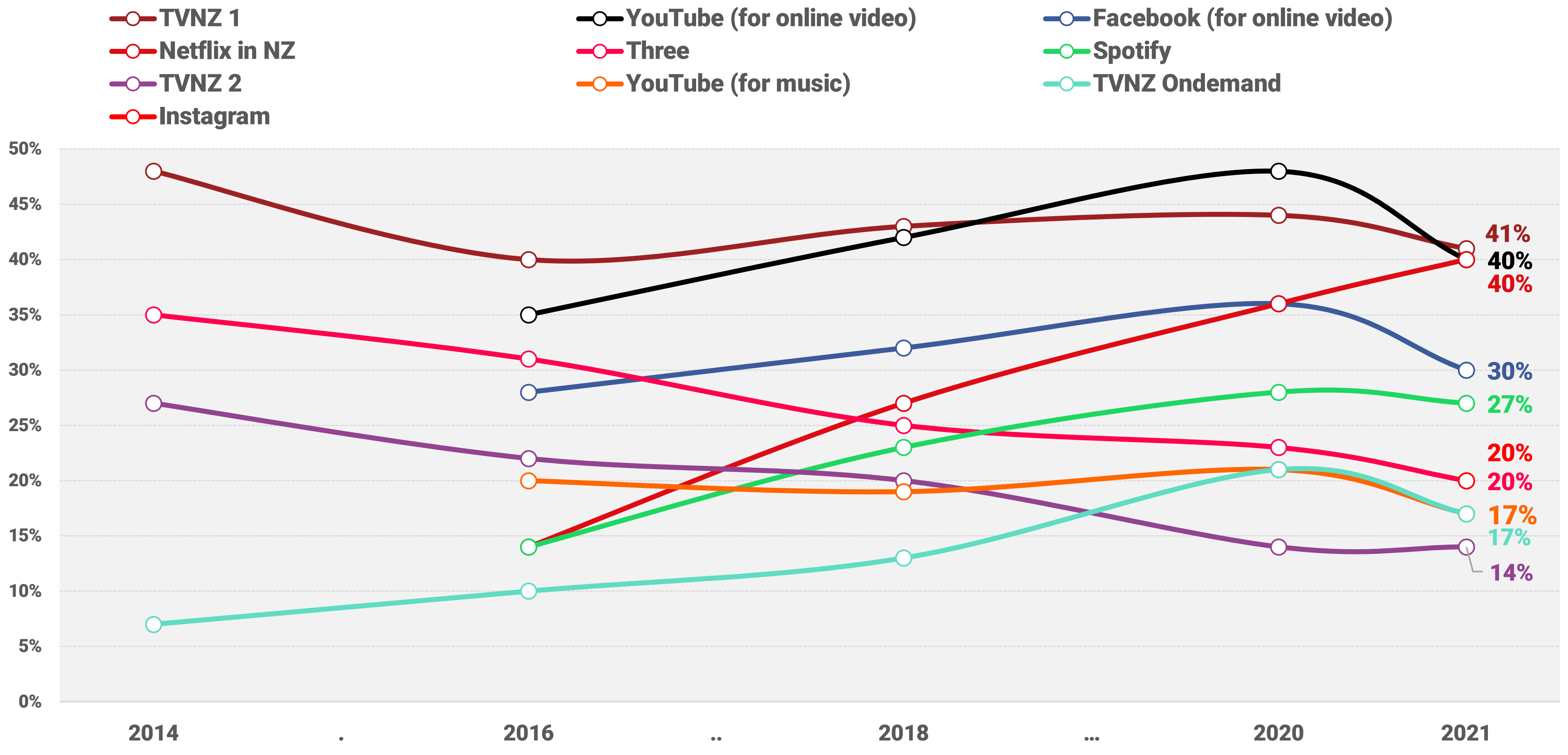
Base: All Asian: (2016 n=160; 2018 n=170; 2020 n=215; 2021 n=202).

Daily Media Consumption by Channel, Site & Station

Top channels, sites & stations 2021. **TVNZ 1, Netflix and YouTube are the content providers who attract the biggest daily audiences in New Zealand in 2021. Netflix has continued to grow its audience reach to four in ten New Zealanders, while nearly all other top providers have declined since 2020.**

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

Q: Which of the following did you use yesterday?



Next tier:

- RNZ National 12%
- TikTok 11%
- Stuff (video) 11%
- NZ Herald (video) 9%
- Newstalk ZB 9%
- Disney Plus 9%

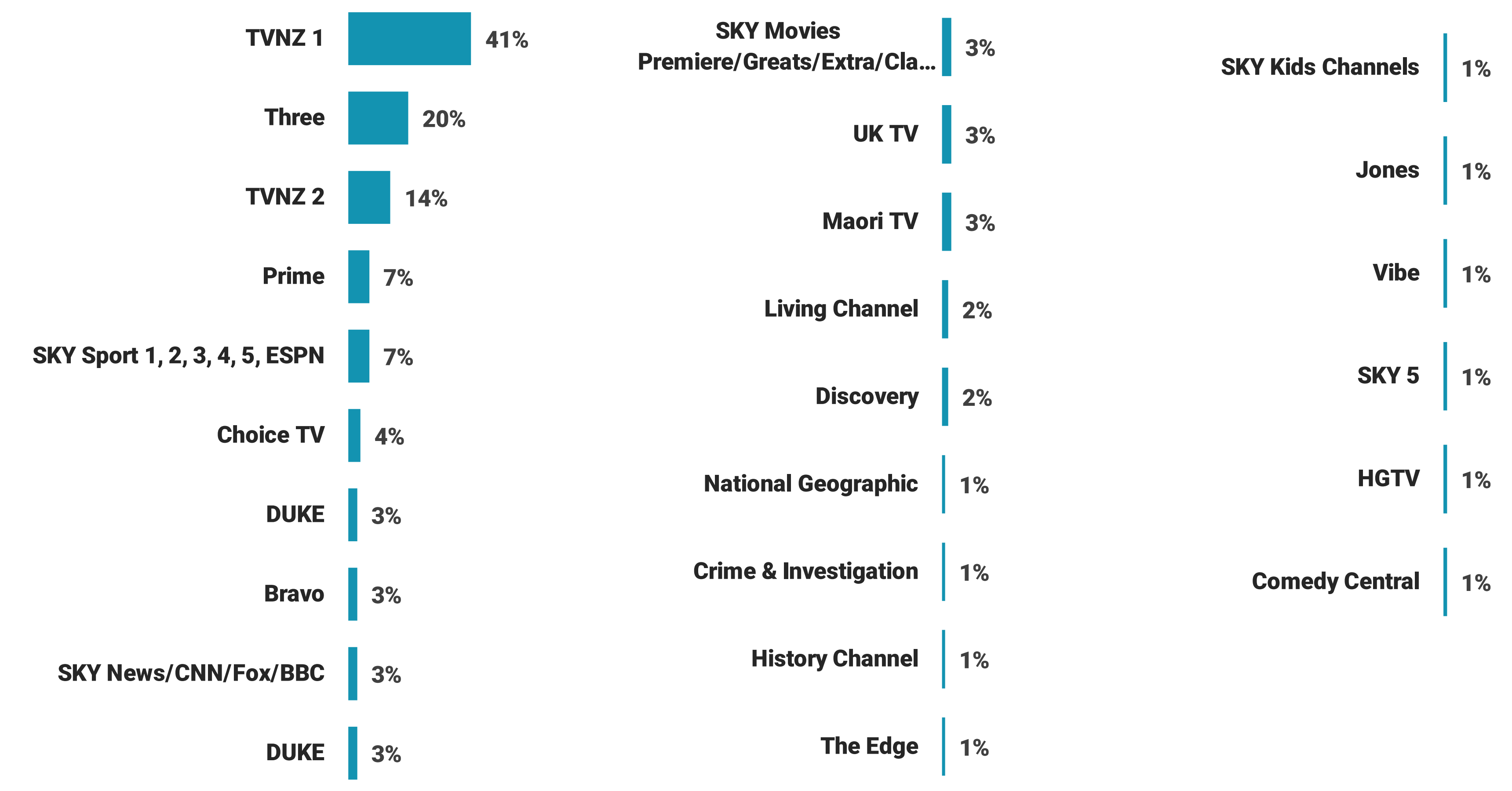
YouTube (for video) and Facebook (for video) have declined significantly which may indicate a peak in viewing in 2020, but could also be influenced by the addition of other overseas online video sites to the survey in 2021.

TVNZ OnDemand and YouTube (for music) show indications of a peak in audiences in 2020 which has declined in 2021.

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

Daily reach of TV channels 2021 – all New Zealanders 15+

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



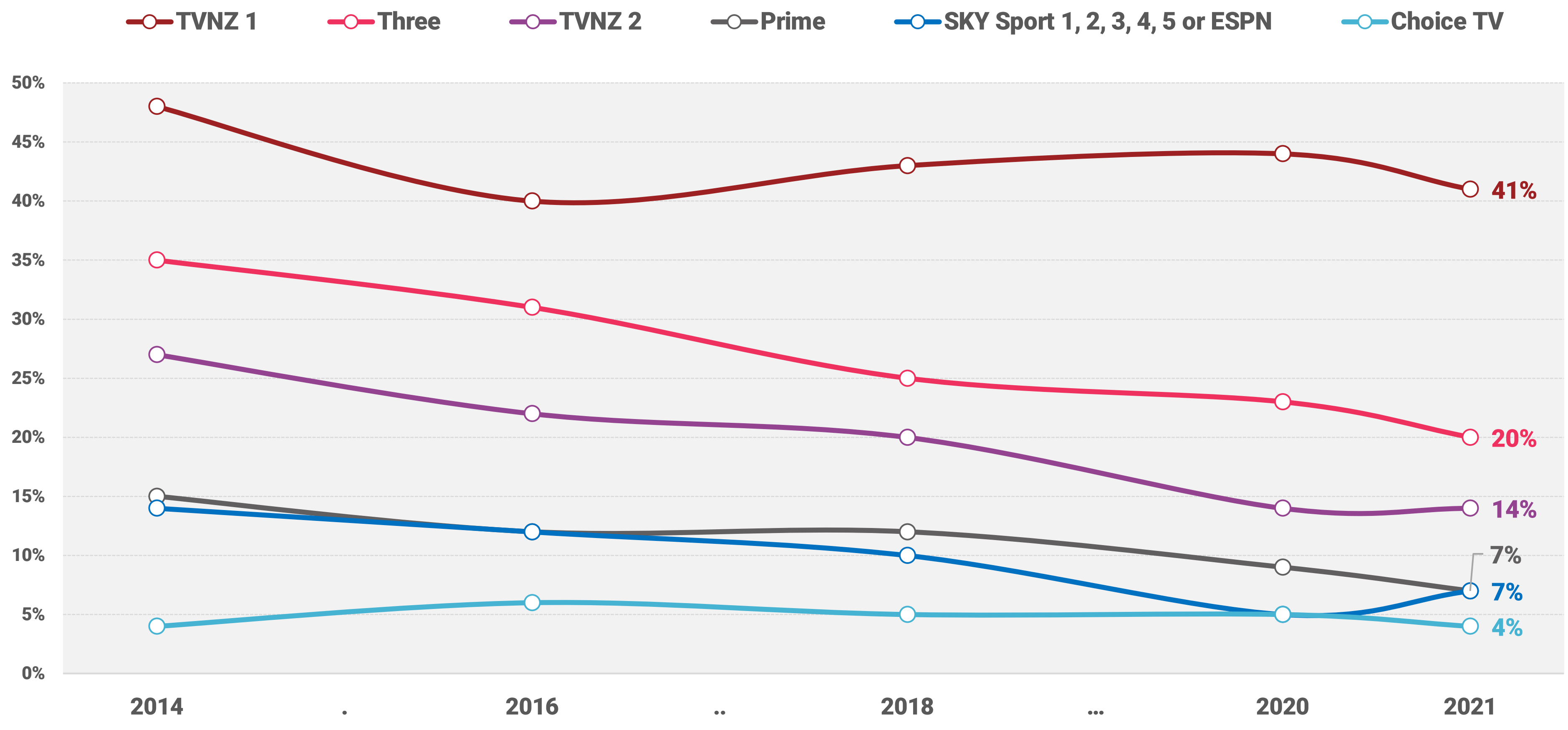
- TVNZ 1's audience is more likely to be aged 55+ (69% reach) or living in SKY homes (58%).
- Three's daily audience is slightly broader with 45+ year olds (28%) more likely to watch each day.
- TVNZ 2's audience does not skew strongly to a particular group, although families with kids under 15 (18%) are slightly more likely to watch, as are Maori and Pasifika (21%).

Base: All New Zealanders 15+: (2021 n=1,420).

Six TV channels reach 4% of New Zealanders or more each day. TVNZ 1, Three and Prime all show slight declines in audience since 2020, while SKY Sport channels recover some of their audience after 2020 when there was no live sport coverage available.

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

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

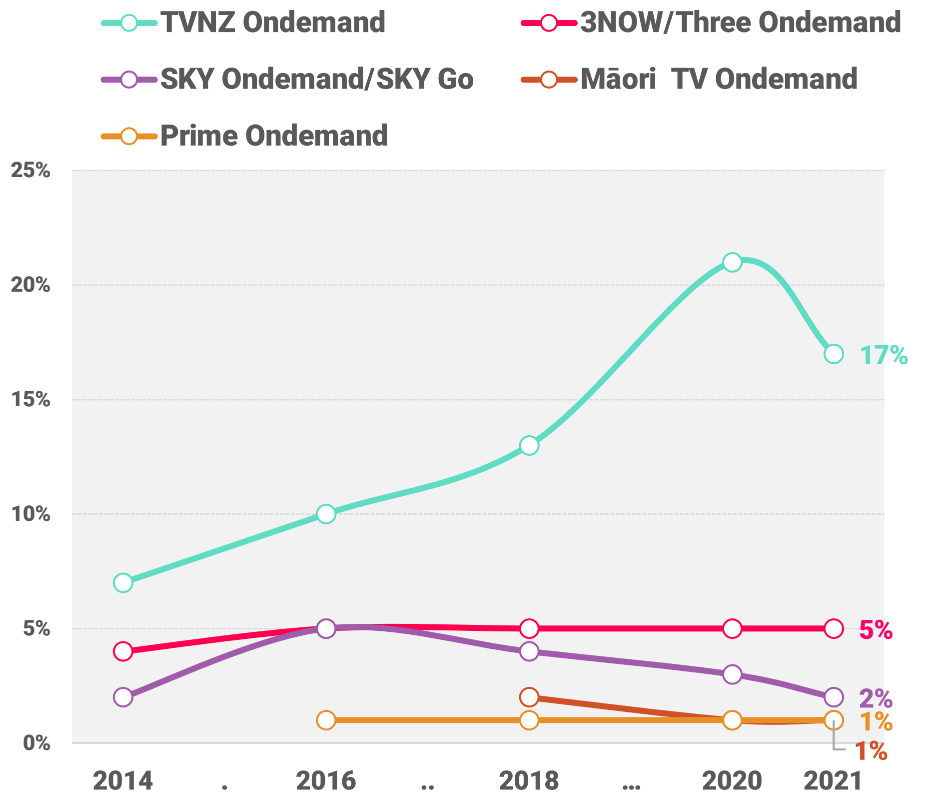


- **TVNZ 1 continues to attract the biggest audience and has only declined slightly since 2020 when it may have been receiving a boost from the daily Covid 19 updates.**
- **Since 2020 DUKE, SKY Movies and SKY News channels have dropped below 4% daily reach.**

TVNZ OnDemand remains the most used site by a significant margin, reaching 17% of New Zealanders each day. However its daily reach has declined since 2020 which may indicate it received a boost in usage during Covid 19 levels 1 and 2. More than one in two viewers (53%) use on demand as a primary source of content either exclusively or as well as a source of catch up.

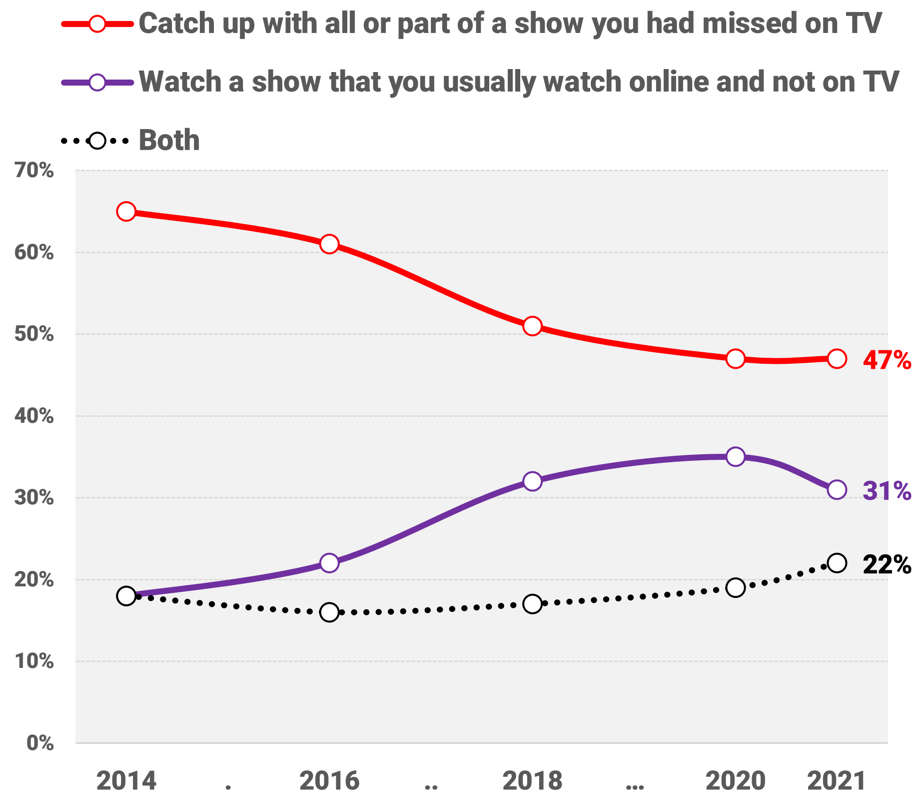
Daily reach of on demand sites – all New Zealanders 15+

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



Reasons for using on demand – all New Zealanders 15+

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



- The profile of the on demand audience is broad compared to other media but tends towards 40-59s, young families and higher socio-economic groups.
- 65+ year olds are less likely to view on demand.
- TVNZ OnDemand viewers skew towards the same groups and especially 45-54s.

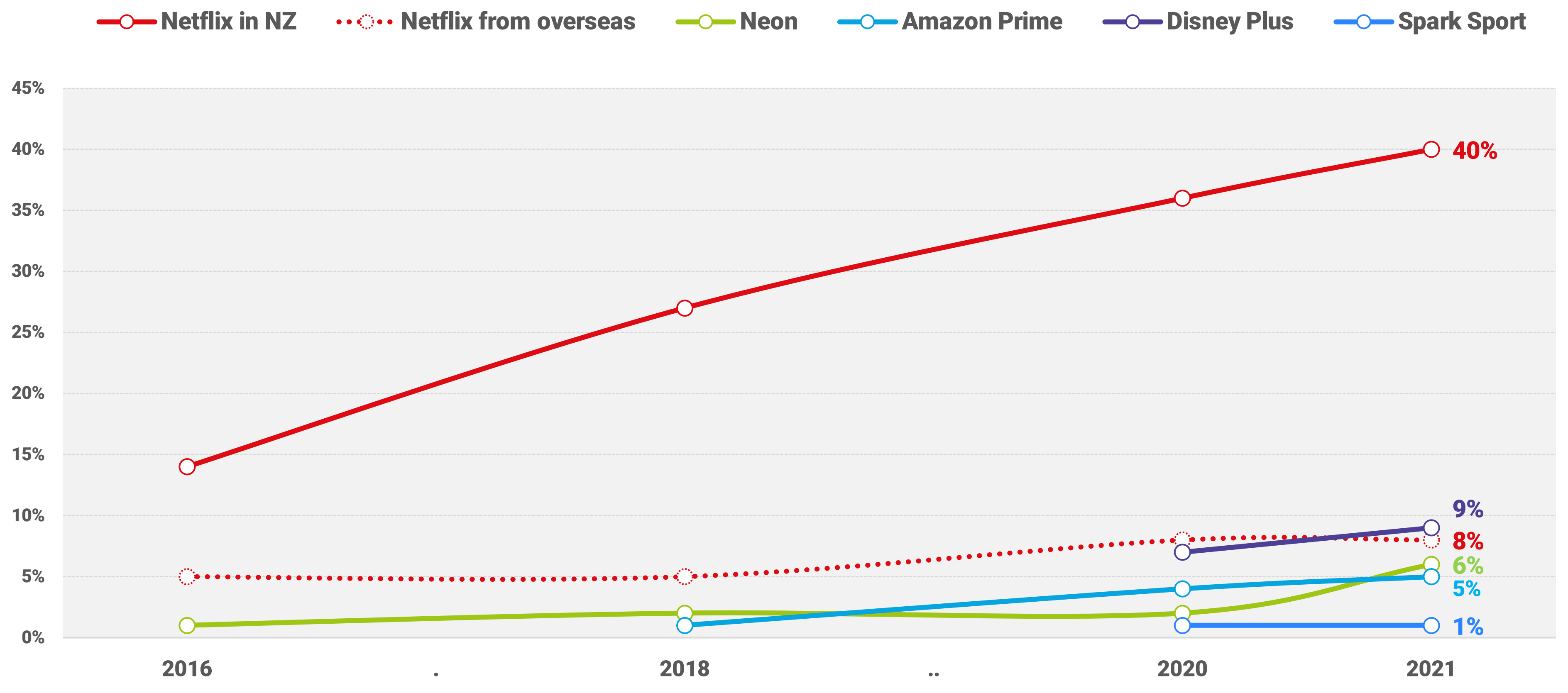
Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Base: Watched Ondemnd: (2014 n=166; 2016 n=248; 2018 n=269; 2020 n=387; 2021 n=299).

Nearly two thirds of New Zealanders (64%) now have access to Netflix, contributing to its ongoing growth in daily reach – four in ten New Zealanders now watch it each day. Disney Plus reaches one in ten (9%) of New Zealanders each day. The newly merged Neon/Lightbox reaches 6%, and Amazon Prime reaches 5% of New Zealanders each day.

Daily reach of SVOD sites – all New Zealanders 15+

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



Note: Neon refers to the newly merged SVOD provider of Neon and Lightbox

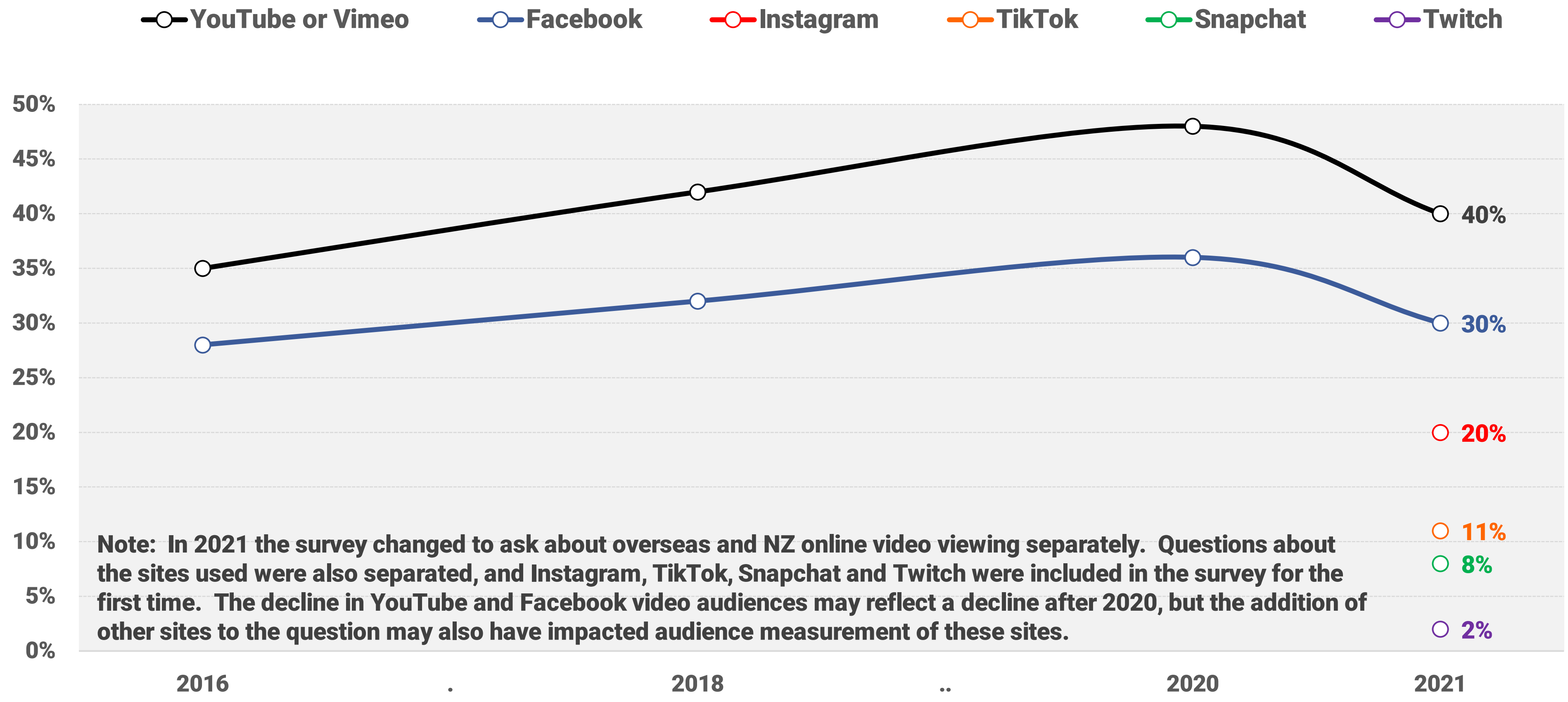
- In 2020 the daily reach of Neon and Lightbox was:
  - Lightbox 4%
  - Neon 2%
- The profile of the SVOD audience overall tends towards under 40 year olds, families, higher income earners and Asian audiences.
- Netflix viewers are more likely to be:
  - Aged 15-44 (55% daily reach)
  - Especially 15-24's (62%)
  - Group flats (50%)
  - Double income couples without kids (59%)
  - Families with kids (51%)
  - High income earners ($120k+ = 48%)
  - Aucklanders (45%)

Base: All respondents: (2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

YouTube (for video) reaches four in ten New Zealanders each day and Facebook (for video) reaches three in ten. One in five New Zealanders watch video on Instagram each day.

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

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



Note: In 2021 the survey changed to ask about overseas and NZ online video viewing separately. Questions about the sites used were also separated, and Instagram, TikTok, Snapchat and Twitch were included in the survey for the first time. The decline in YouTube and Facebook video audiences may reflect a decline after 2020, but the addition of other sites to the question may also have impacted audience measurement of these sites.

The overall profile of the online video audience tends towards under 40 year olds, families, Asian and Pasifika audiences.

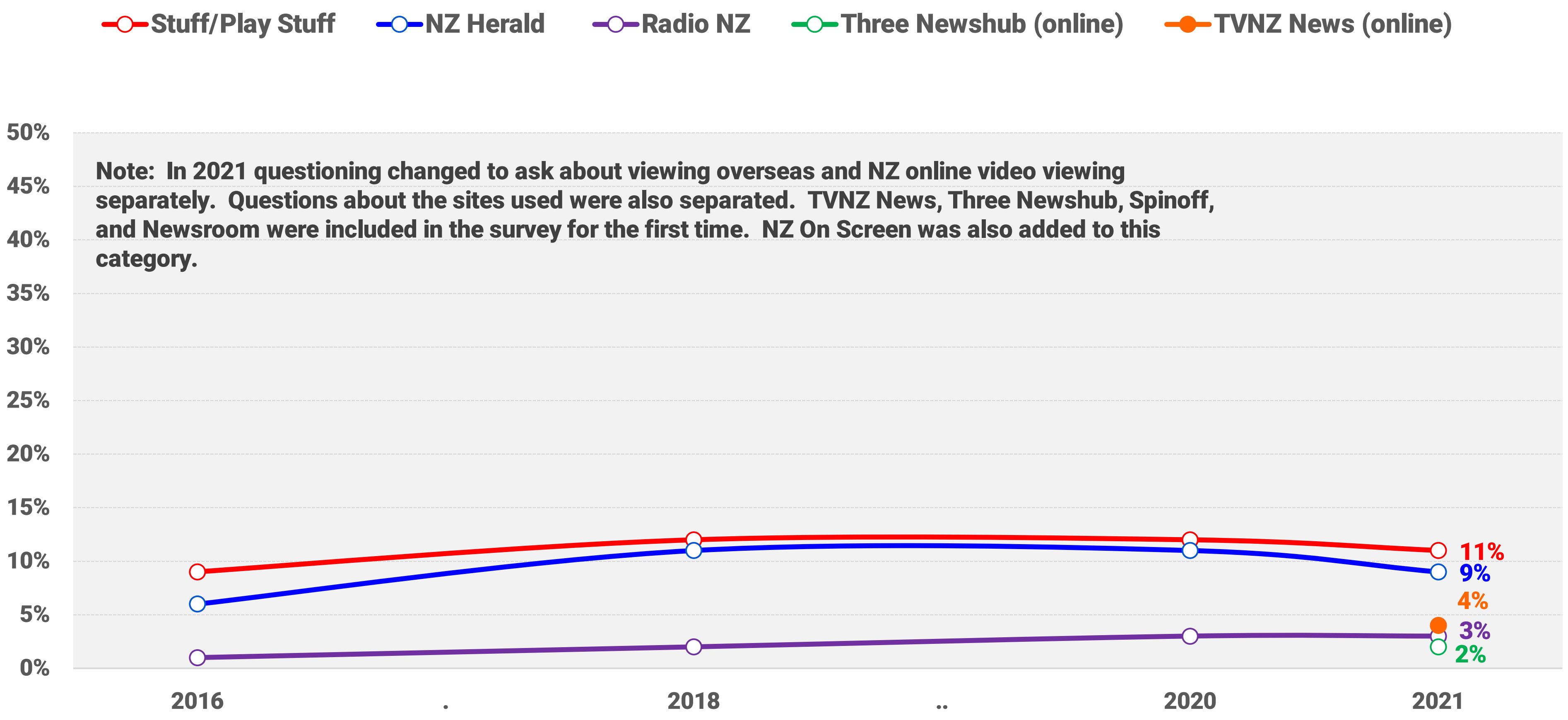
YouTube (for video) viewers are more likely to be:

- Males (47%)
- Aged 15-34 (60%)
- Students (65%)
- Young singles/couples without kids (48%)
- Larger homes (3+ people = 47%)
- Asian (71%)
- Pasifika (48%)
- Aucklanders (47%)

Stuff continues to be the most widely used NZ online video site, narrowly ahead of NZ Herald. Between 2% and 4% of New Zealanders watch video on TVNZ News online, Radio NZ online, and Newshub online each day.

Daily reach of NZ online video sites – all New Zealanders 15+ (2% reach or more)

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

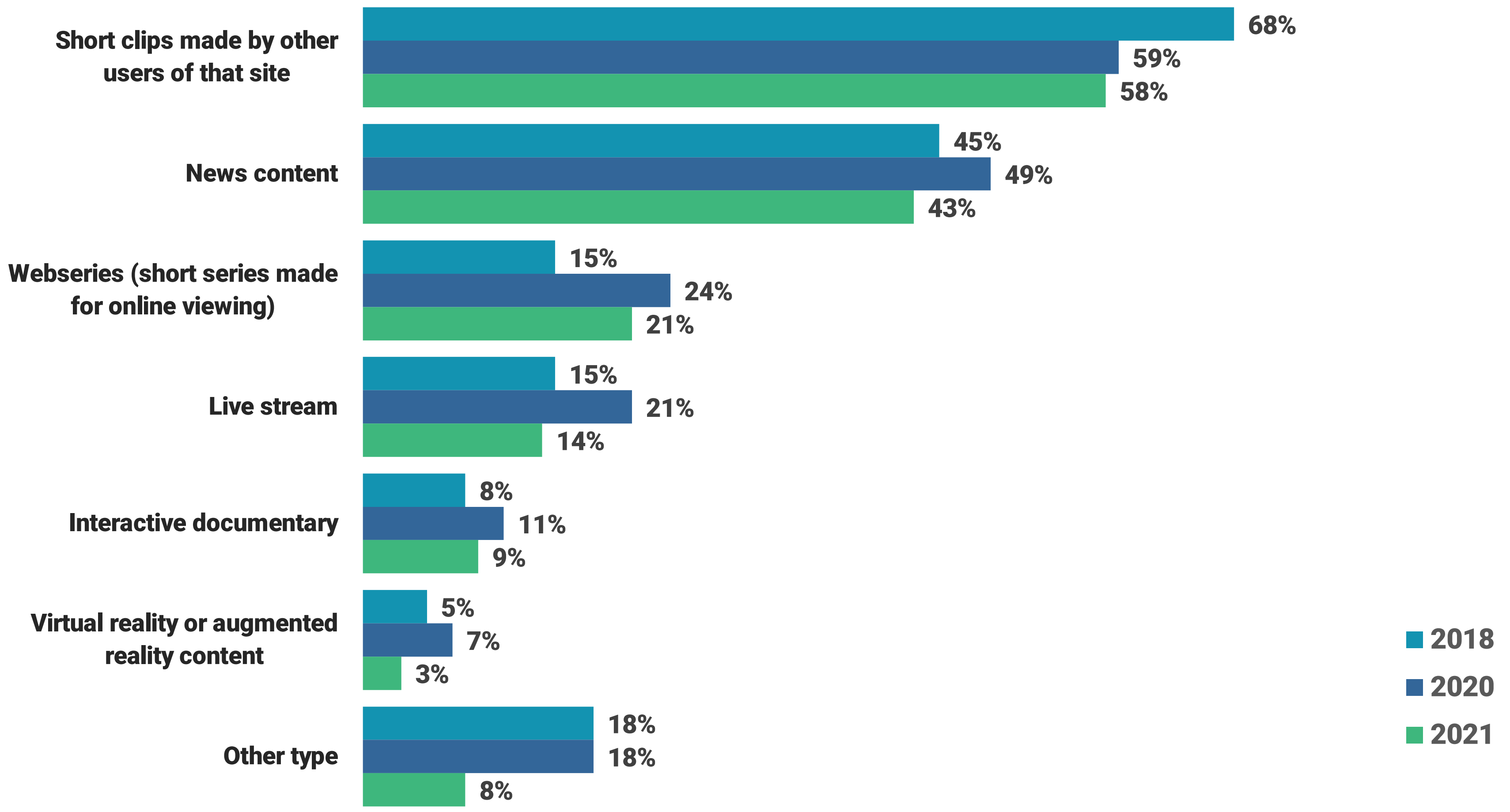


1% of New Zealanders watch video on Newsroom, The Spinoff or NZ On Screen each day.

User generated clips remain the most popular type of video to watch online followed by news content. There has been a decline in viewing of both news content viewing and live streaming which may reflect a boost in viewing this content in 2020 as a result of Covid 19 news updates.

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

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



Base: All who watch online video: (2018 n=736; 2020 n=907; 2021 n=844).

Radio NZ National reaches slightly more than one in ten New Zealanders each day, with Newstalk ZB slightly below this. Four stations (The Edge, The Breeze, ZM, More FM) reach 5-6% of New Zealanders each day.

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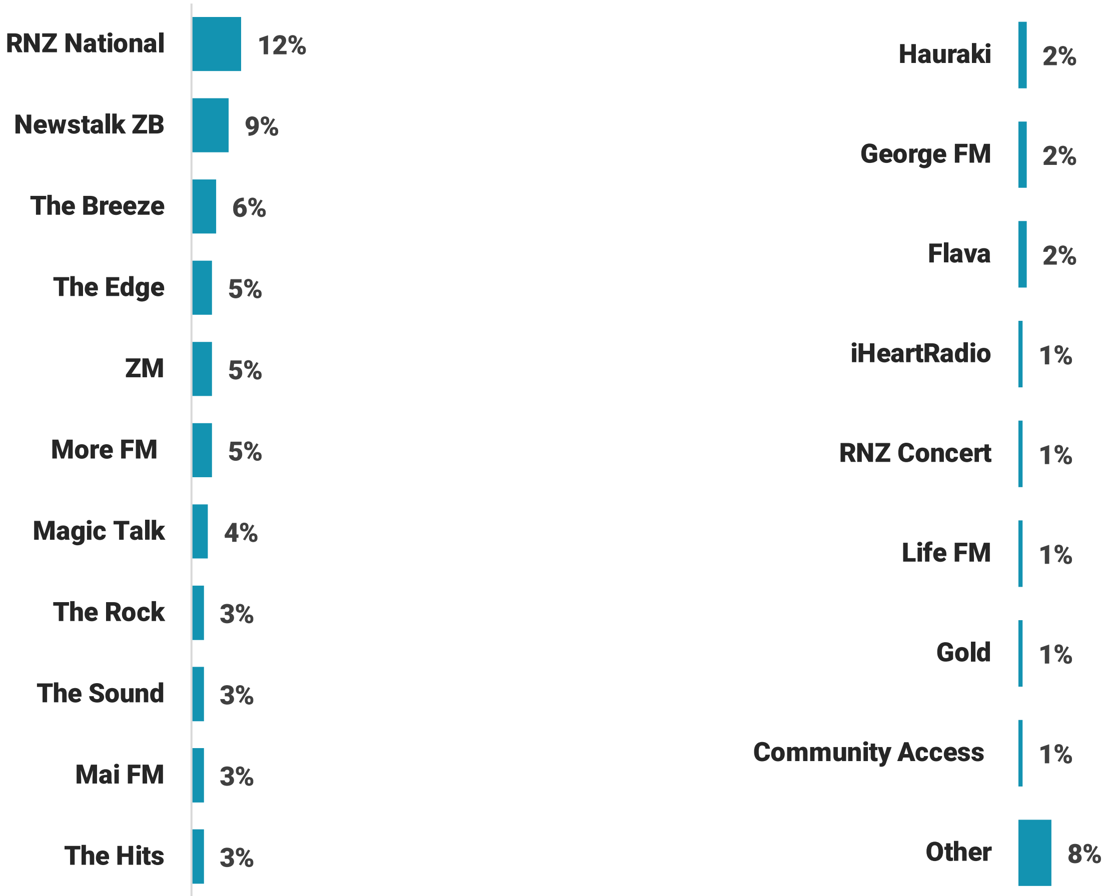
Daily reach of radio stations 2021 – all New Zealanders 15+

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



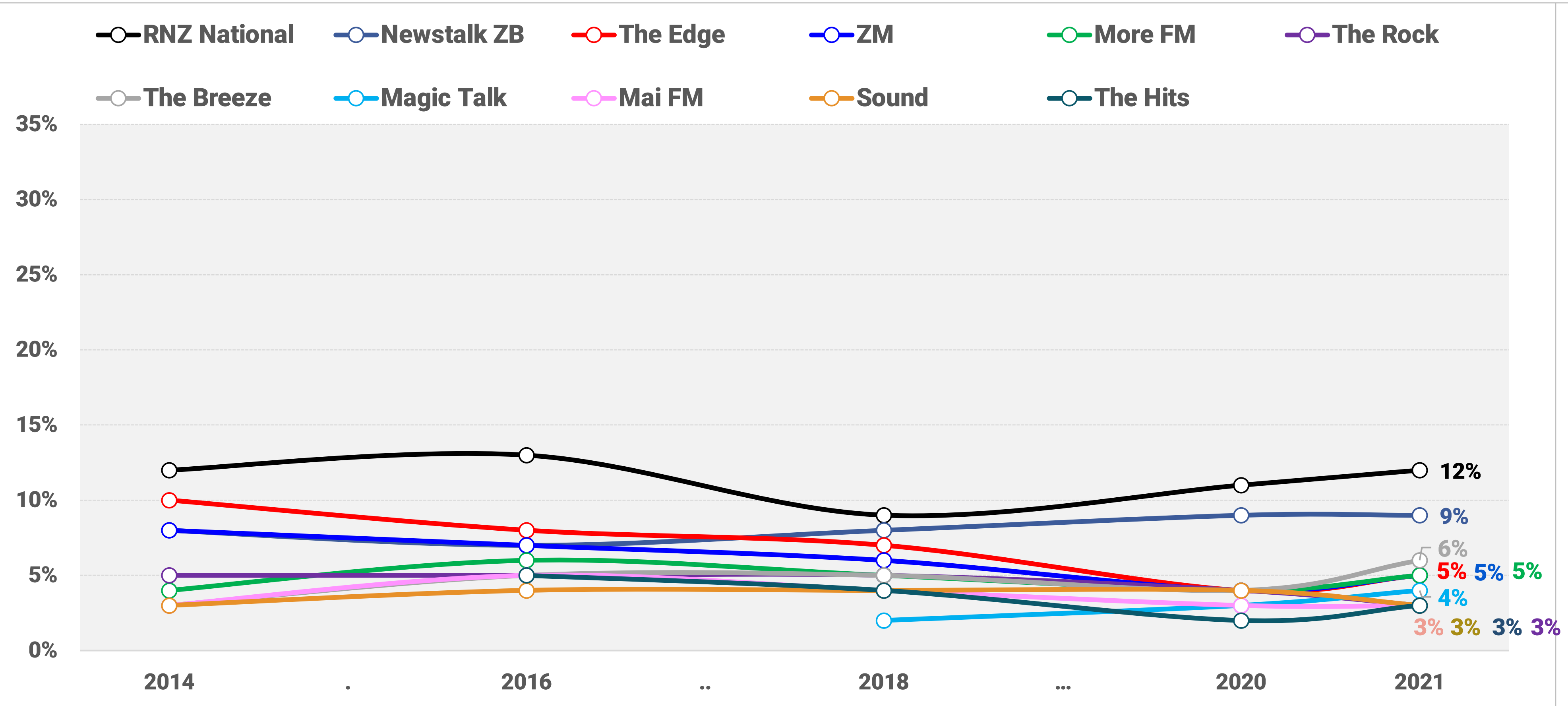
- There is a long tail of radio stations that reach less than 1% of New Zealanders each day.
- The overall profile of the radio audience tends towards New Zealanders aged 60+, high income earners, and SKY TV homes.

Base: All New Zealanders 15+: (2020 n=1,420).

Audiences on individual radio stations are relatively stable over time. There are indications of a dip in audiences for several stations in 2020, though nearly all these movements are within the margin for error. The exceptions are The Breeze (up to 6%) and Magic Talk (up to 4%), both of which show significant increases in 2021.

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

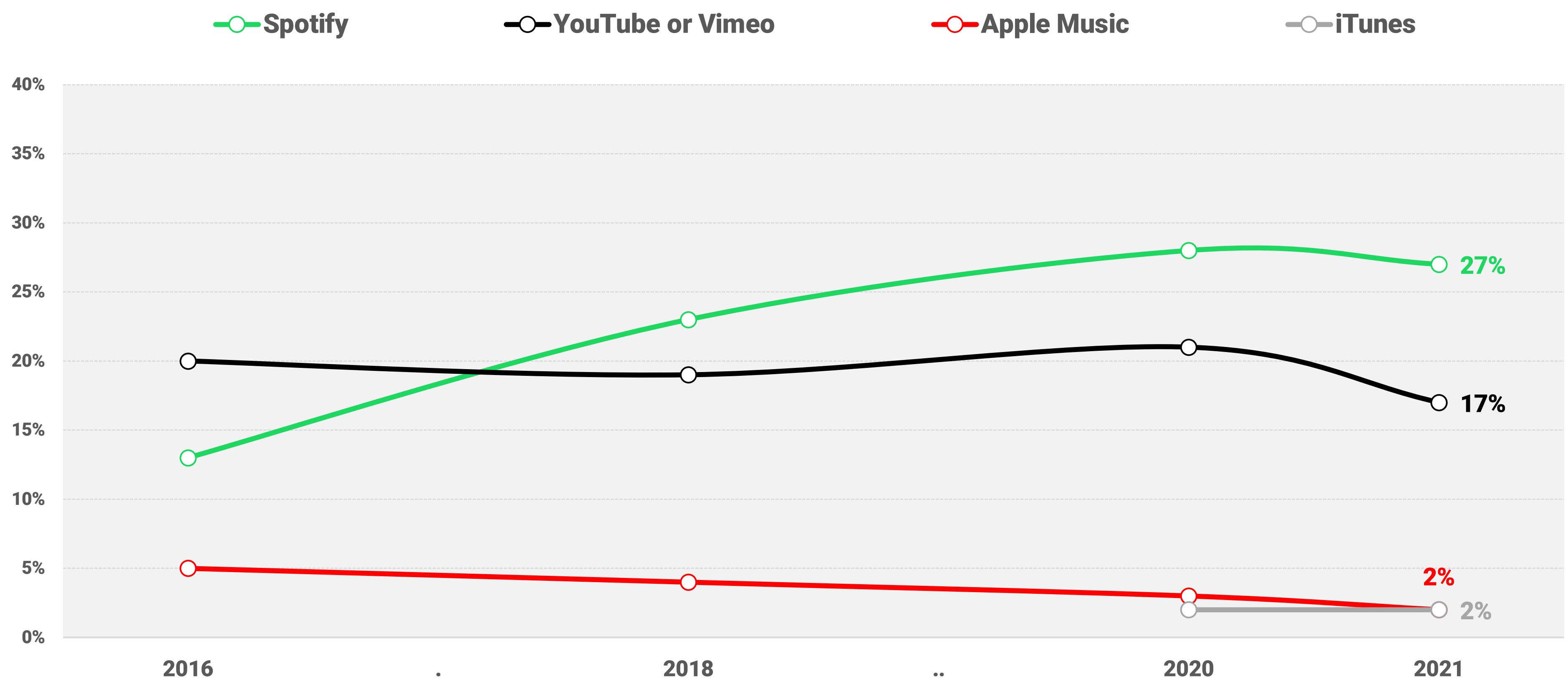
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



Spotify reaches slightly more than one in four New Zealanders each day, though it has not grown its audience in the last 12 months. YouTube (for music) is second most used but this audience has declined since 2020. No other streaming site reaches more than 2% of New Zealanders each day.

Daily reach of music streaming site over time – all New Zealanders 15+

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



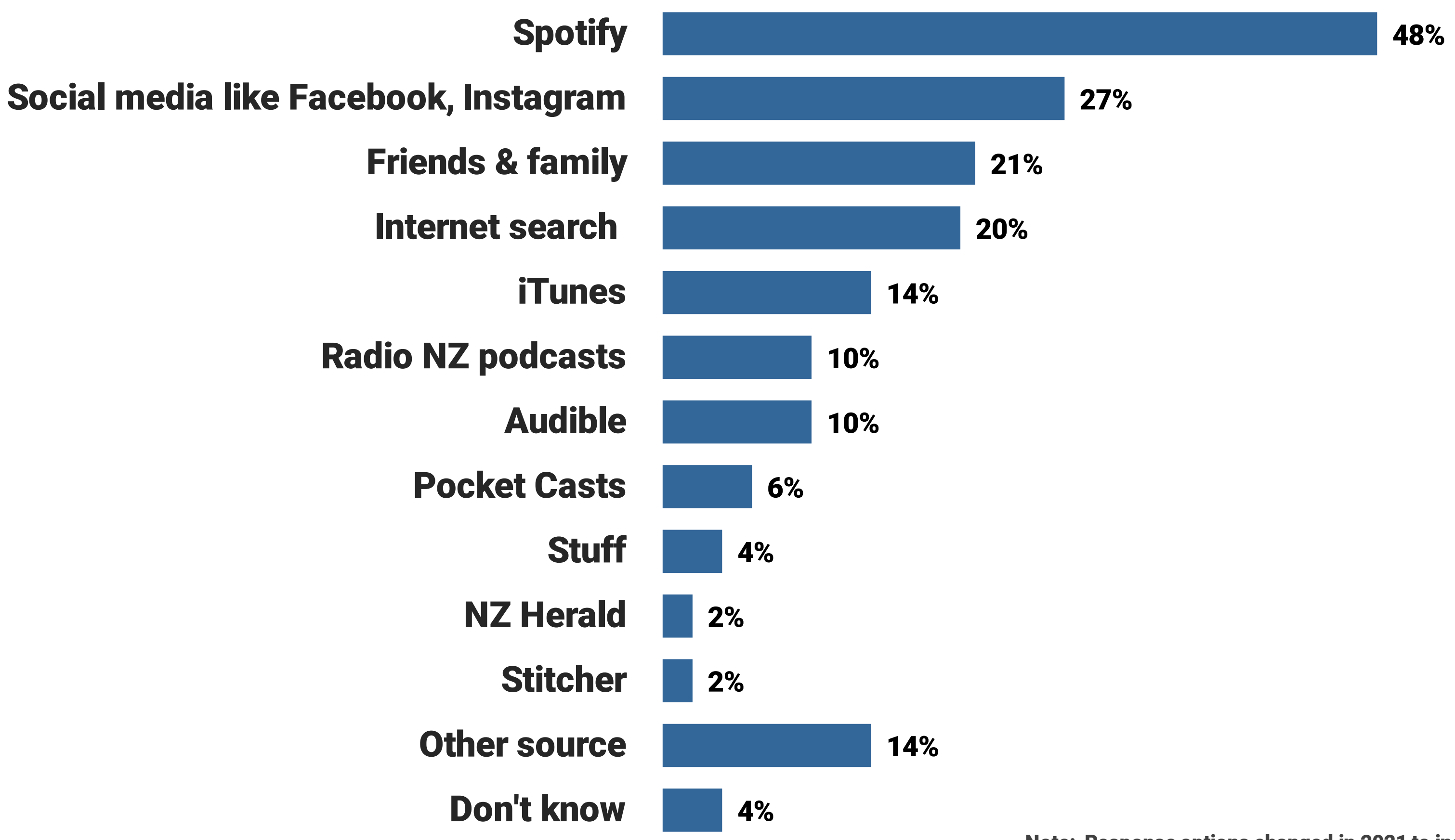
- SoundCloud – 1%
- iHeartRadio – 1%
- Rova – 1%
- Amazon Music Unlimited – 1%
- The overall profile of the music streaming audience skews towards 15-39s (and esp. 15-24s), families, Māori, Pasifika and Asian audiences.
- Spotify listeners are more likely to be:
  - Aged 15-34 (52%) – esp. 15-24s (62%)
  - Young singles/couples without kids (35%)
  - Families with kids (35%)

Base: All respondents: (2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Spotify is the most common way New Zealanders find out about new podcasts. Word of mouth from social media or friends and family is also influential, and one in five simply use Google to search for podcasts.

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

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



Note: Response options changed in 2021 to include "Internet search".

Note that the addition of "Internet search" as a response option may have influenced how people answered this question in 2021, and may have resulted in a decrease in influence of social media in 2021.

Base: All who listen to podcasts: (2021 n=180).

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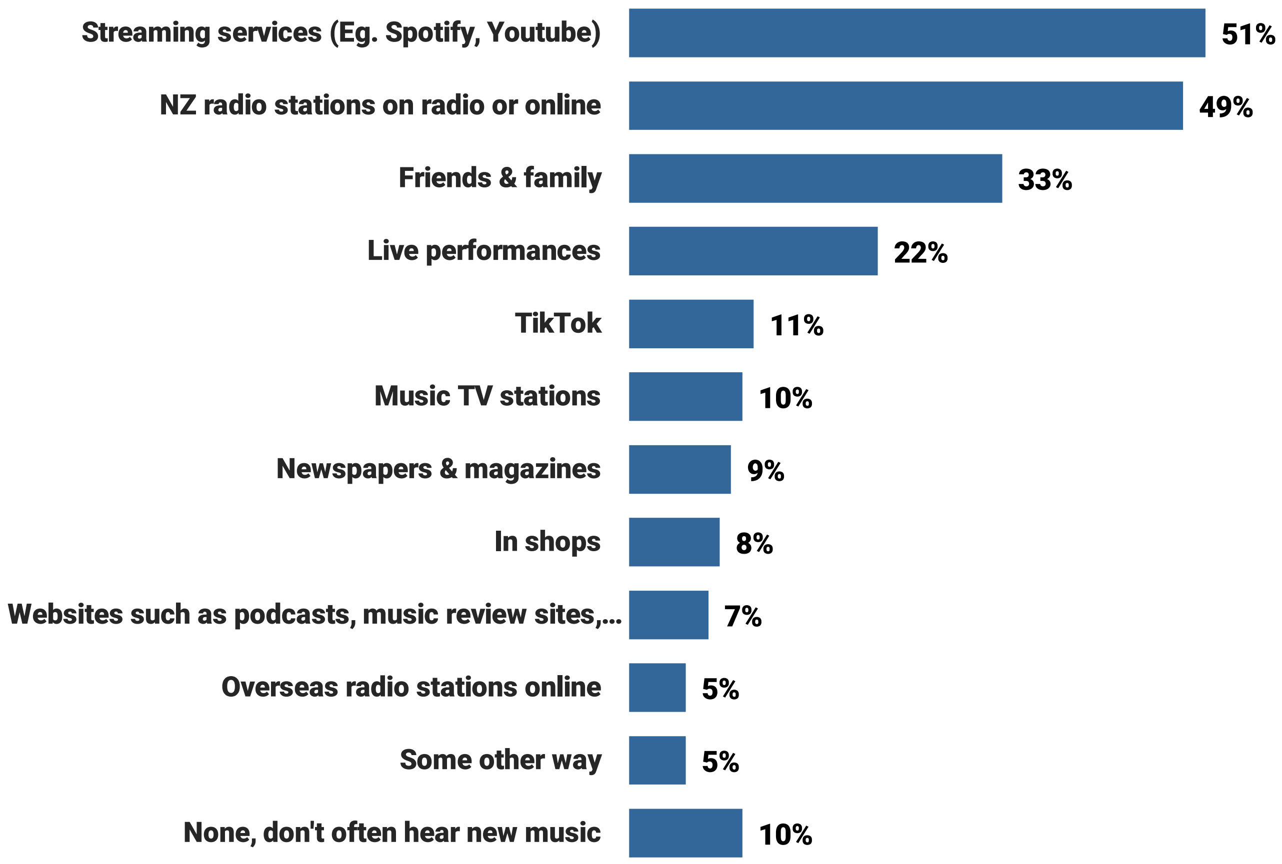
Music Consumption and Behaviour

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

Sources of awareness of new music 2021 – all New Zealanders 15+

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



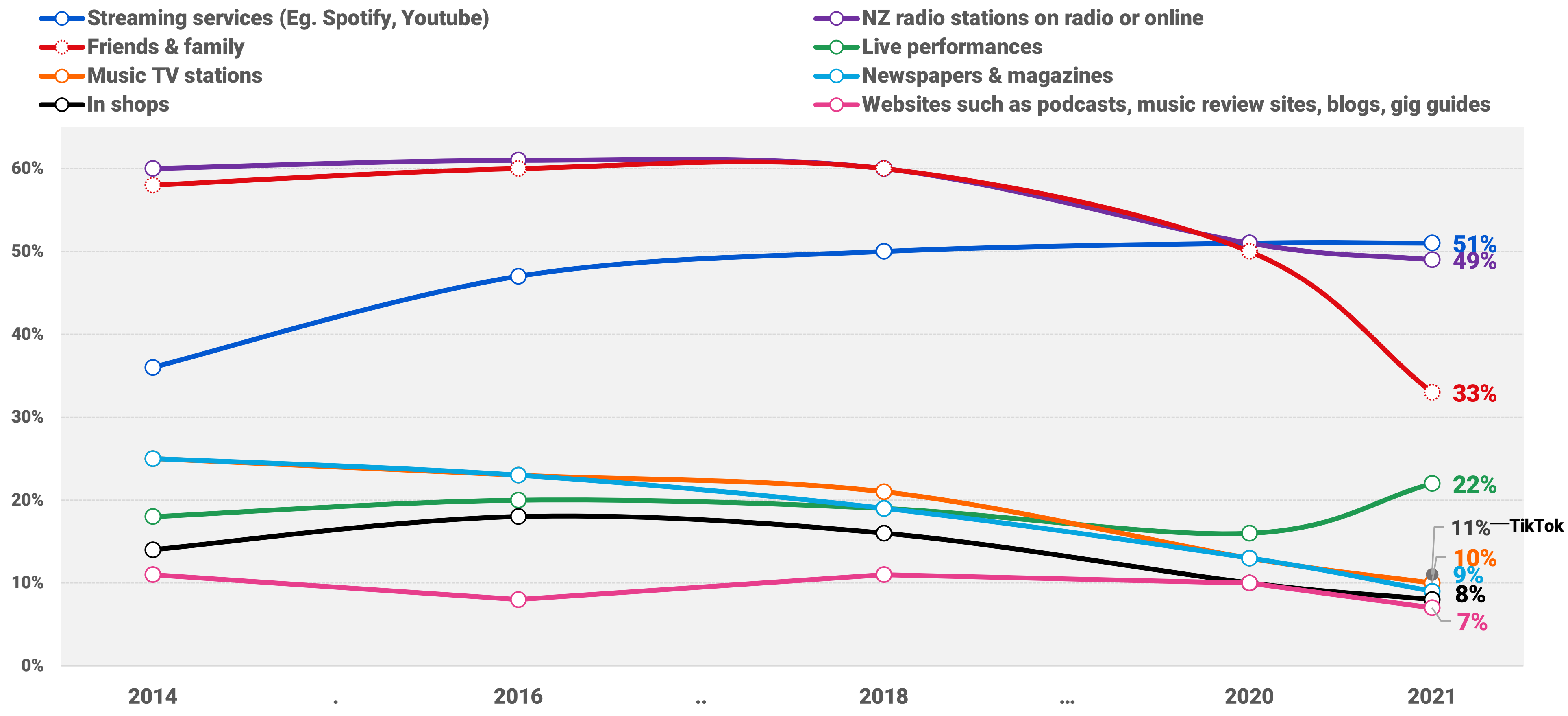
- Streaming services are more widely used as a source of new music by 15-44 year olds (71%), and especially 15-24s (79%).
- Females (54%) are more likely to use radio as a source of new music, as are older New Zealanders.
- 15-24 year olds are most likely to find friends and family a useful source of new music (45%).

Base: All New Zealanders 15+ (2021 n=1,420).

Usage of streaming services and radio are stable and equally popular as sources of new music – each used by one in two New Zealanders. Word of mouth continues to rapidly decline as a source. Several other sources, except live performances, also show slight declines in influence in 2021. TikTok is used as a source of new music by one in ten New Zealanders.

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

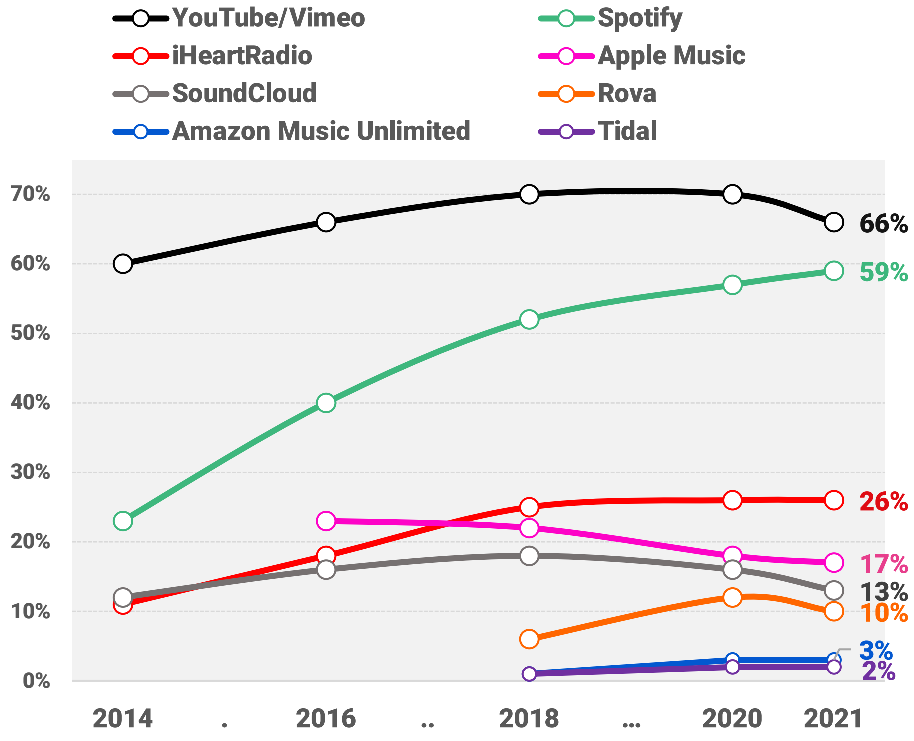
Q: In which of the following ways, if any, do you usually find out about new music?



Since 2018 the size of the audience who has ever listened to music online has not grown – it is not attracting new users. Instead audience growth has come from increased frequency of use. However growth in frequency has also stabilised in 2021 with YouTube and Spotify each used by slightly more than four in ten New Zealanders each week, and about one in four or five each day.

Ever listen to music online - all New Zealanders 15+

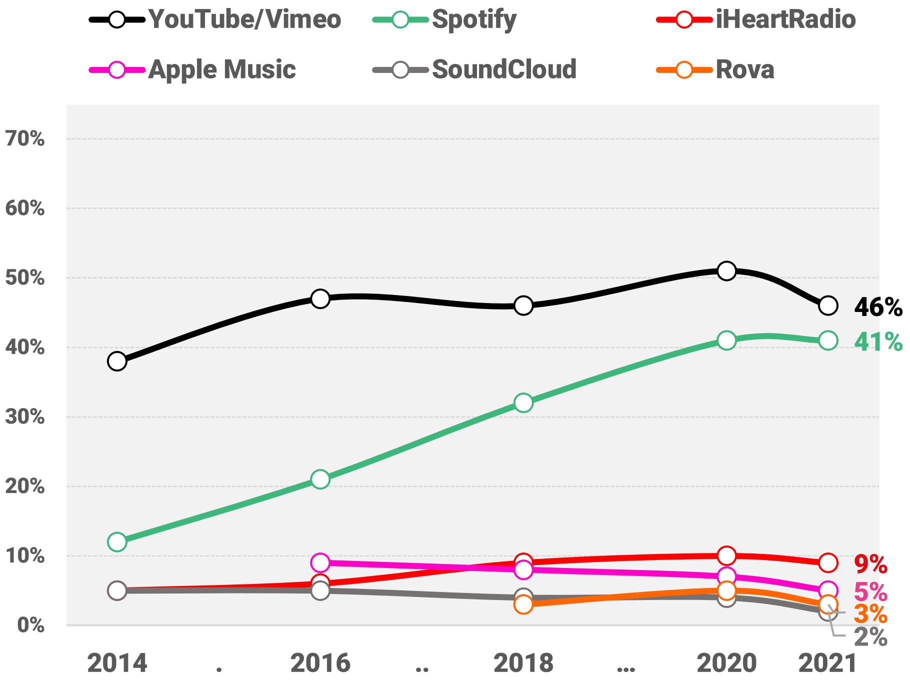
Q: Which of the following have you ever listened to music on?



None of these	2014	2016	2018	2020	2021
	31%	23%	17%	13%	14%

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

Q: About how often do you listen to… ?



Every day	2016	2018	2020	2021
YouTube	17%	17%	21%	19%
Spotify	10%	17%	22%	24%

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

- 49% of 15-34 year olds listen to Spotify everyday, and 61% of 15-24s do so.
- 32% of 15-34 year olds listen to music on YouTube everyday, and 29% of 15-24 do so.

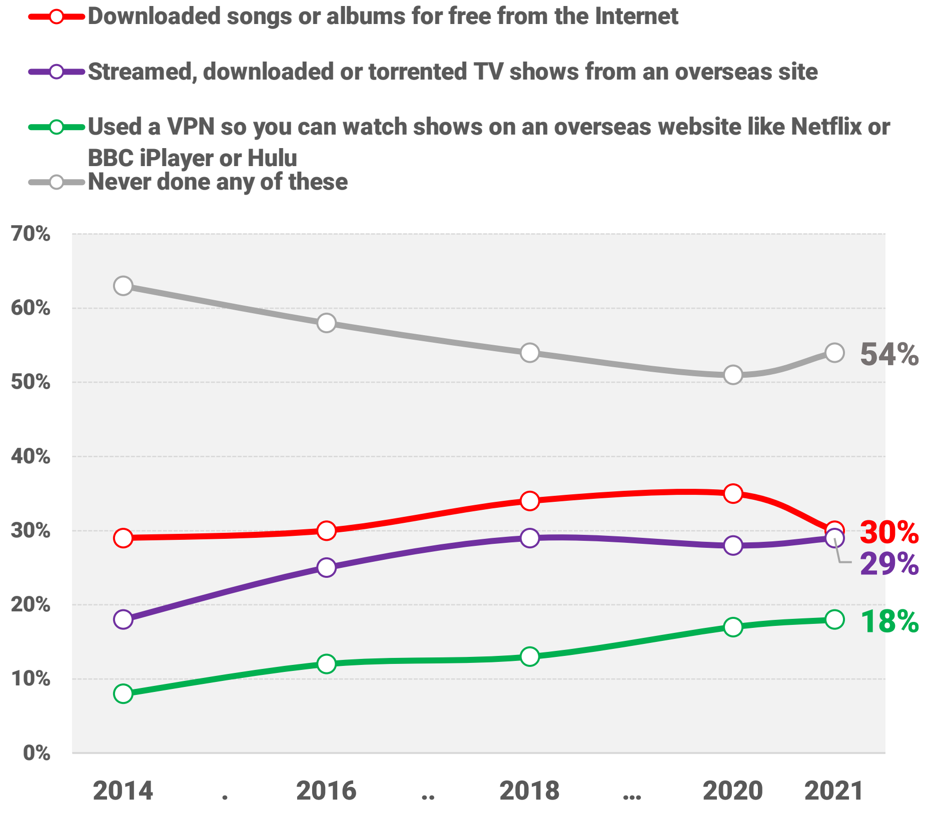
Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Streaming, Downloading and Torrenting

The proportion of New Zealanders who have ever used unauthorised platforms is stable in 2021. One in two have never done any of these activities. Frequency of use is also stable with fewer than one in ten New Zealanders engaging in these activities once a week or more.

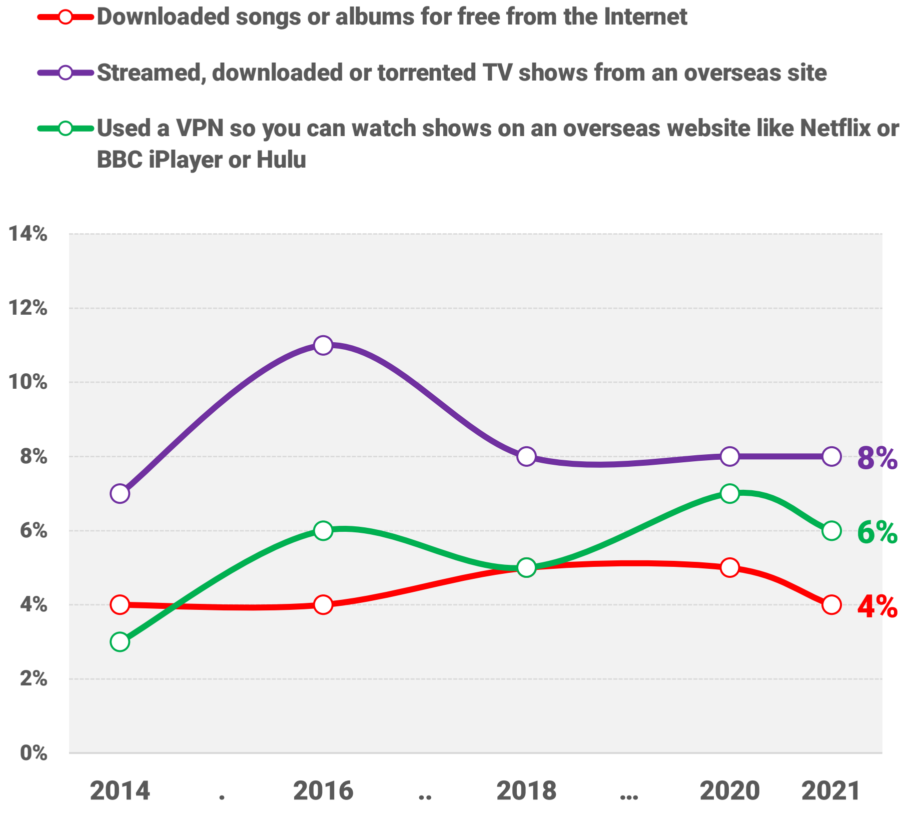
Ever used unauthorised platforms – all New Zealanders 15+

Q: Which of the following have you ever done?



Weekly reach – all New Zealanders 15+

Q: About how often would you… ?

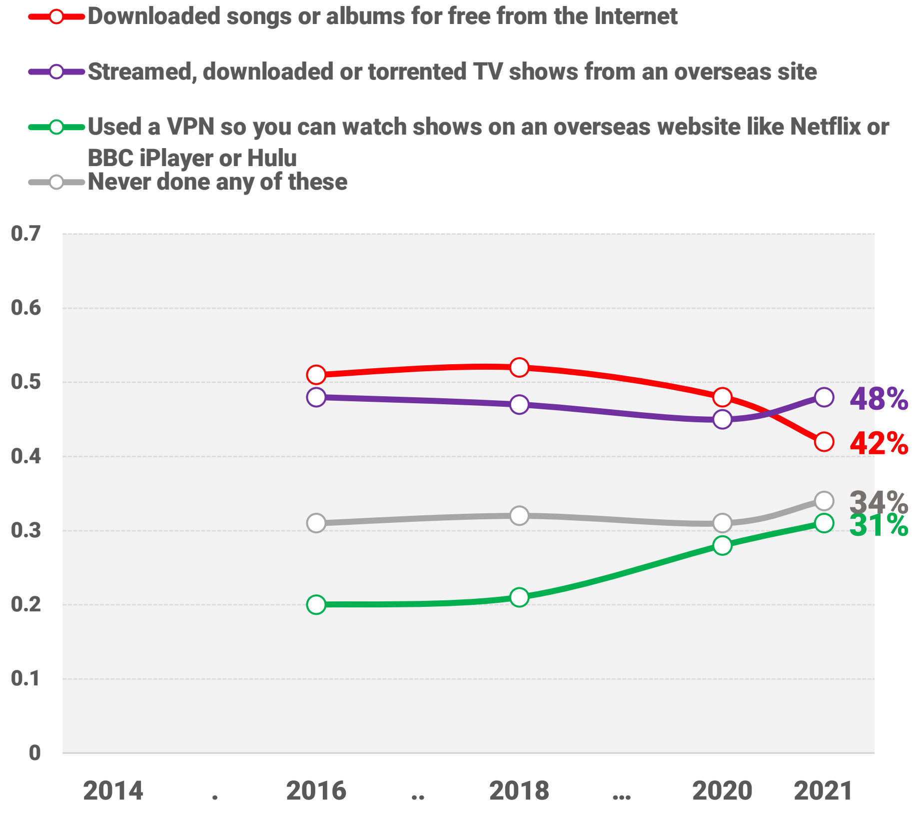


Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

Use of unauthorised platforms is higher among younger New Zealanders but no more than one in ten do any of these activities more than once a week. Usage of VPNs is slowly growing among 15-34s.

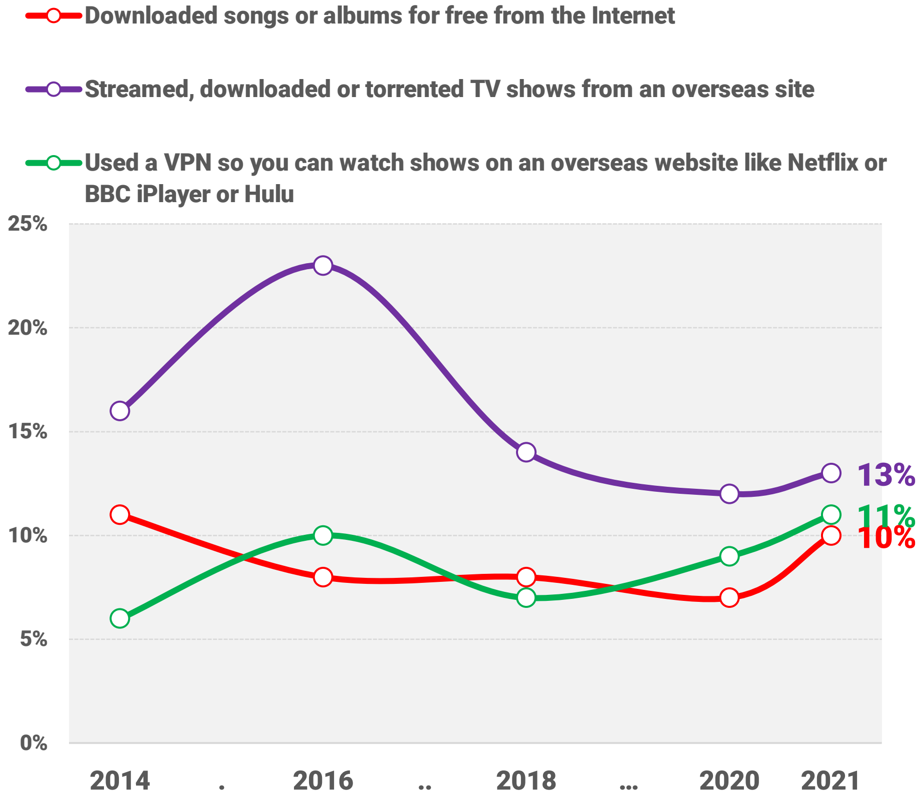
Ever used unauthorised platforms – 15-34 year olds

Q: Which of the following have you ever done?



Weekly reach – 15-34 year olds

Q: About how often would you… ?



Base: All 15-34 year olds: (2014 n=425; 2016 n=460; 2018 n=458; 2020 n=494; 2021 n=477).

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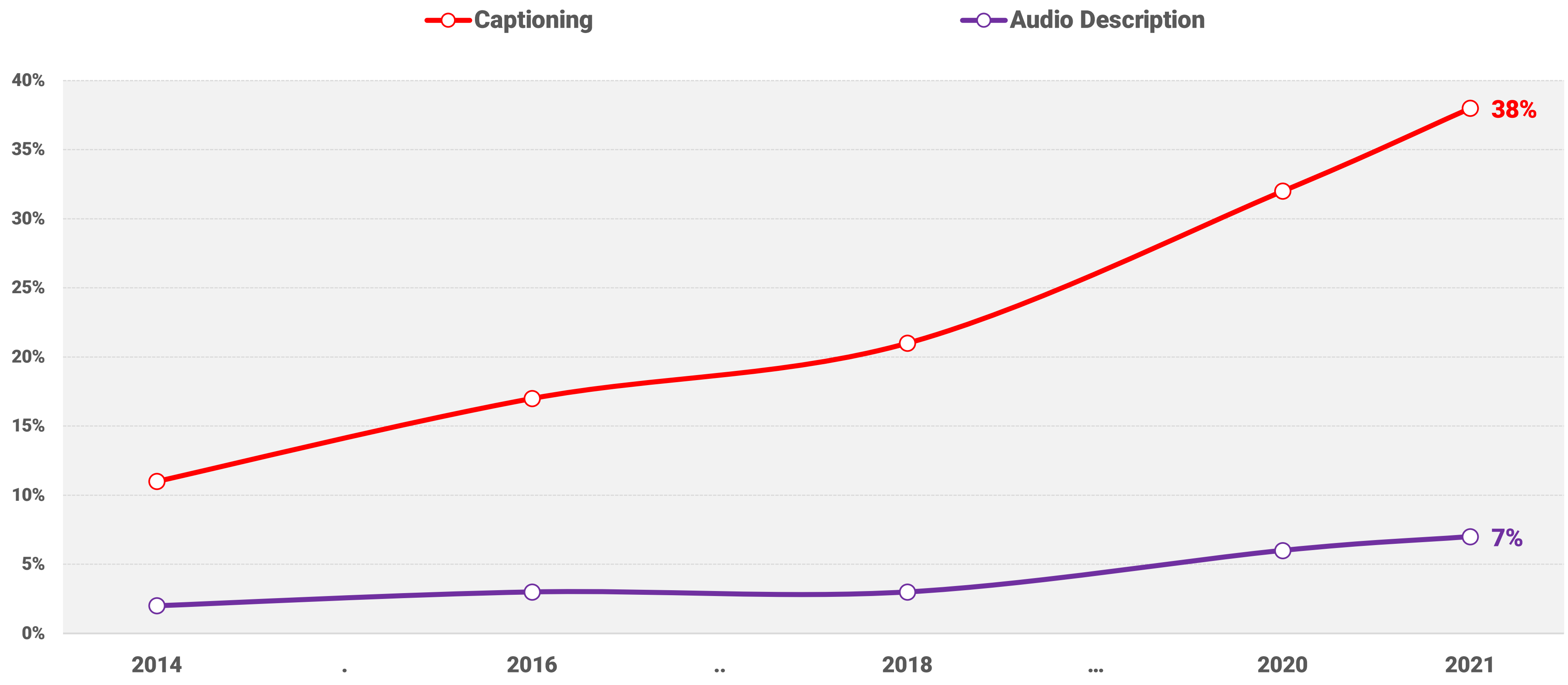
Captioning and Audio Description

The proportion of New Zealanders who ever use captioning continues to rise rapidly, now up to nearly four in ten.
Use of audio description has also increased slightly to 7%.

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

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



- The groups most likely to ever use the captioning service are New Zealanders of Asian descent (58%) and Pasifika (62%).
- Other groups also more likely to ever use captioning are:
  - 15-34 year olds (53%)
  - Young singles/couples, no kids (53%)
- Conversely, just 26% of people aged 55 or more ever use captioning.

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

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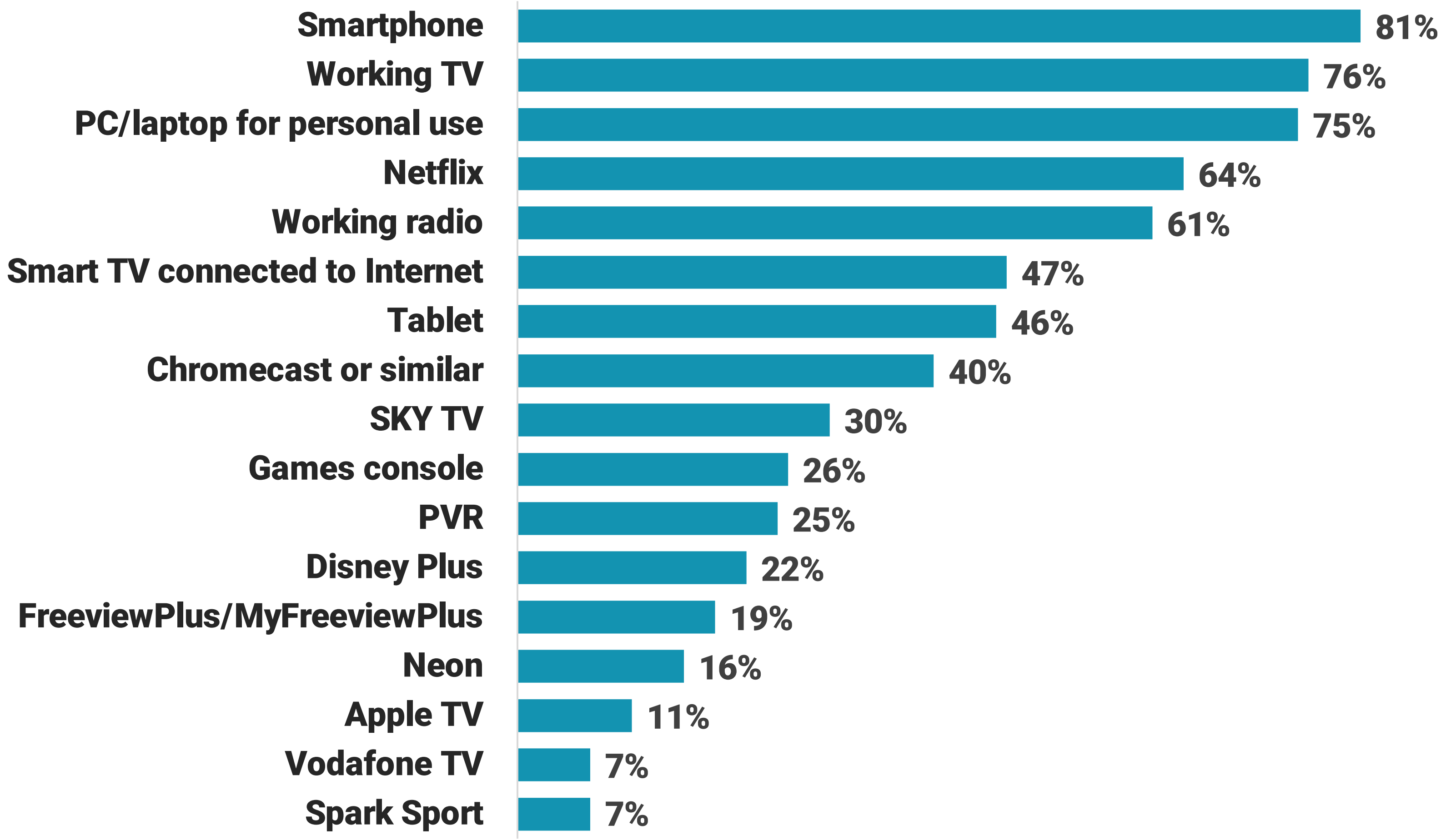
Devices Personally Own or Have Daily Access To

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

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

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

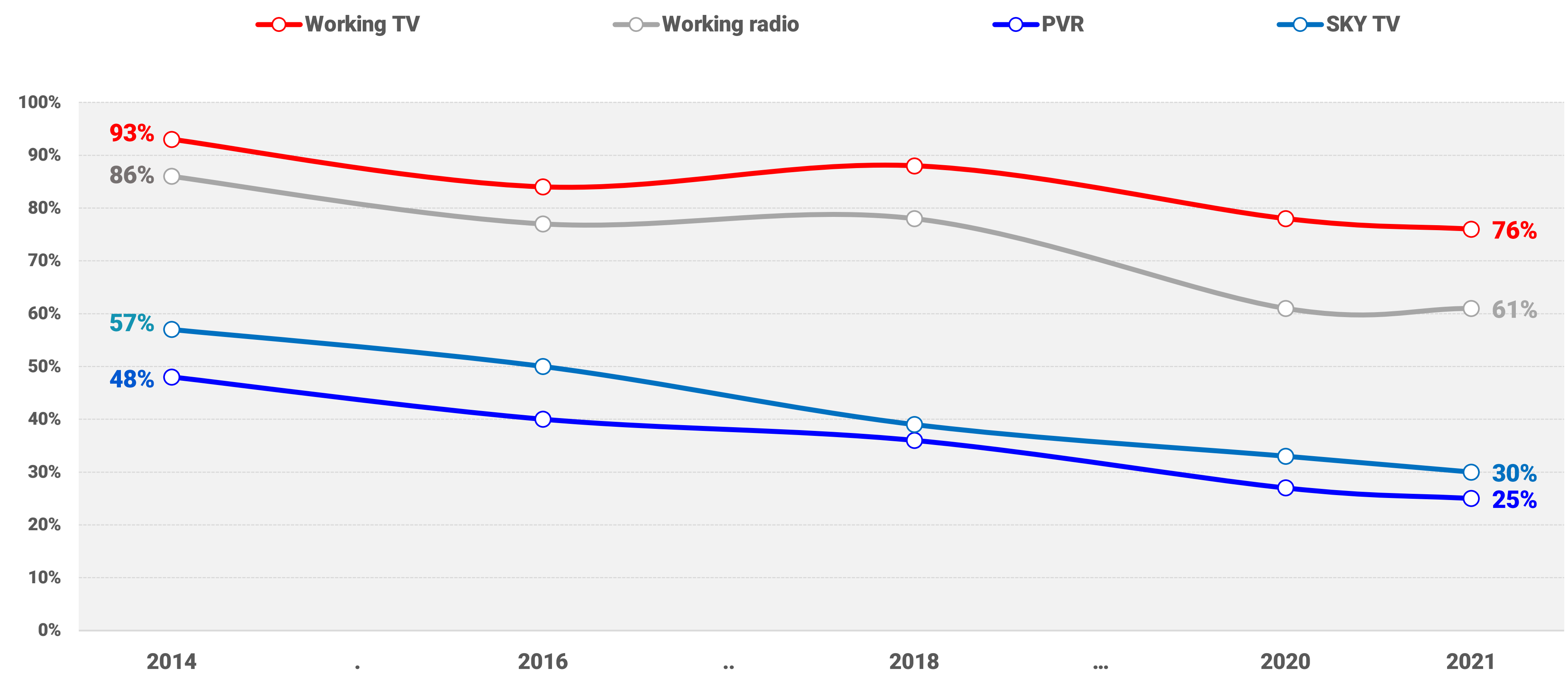


Base: All New Zealanders 15+: (2021 n=1,420).

The incidence of nearly all devices and platforms through which New Zealanders access traditional media has declined slightly since 2020. The exception is a working radio which is stable since 2020.

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

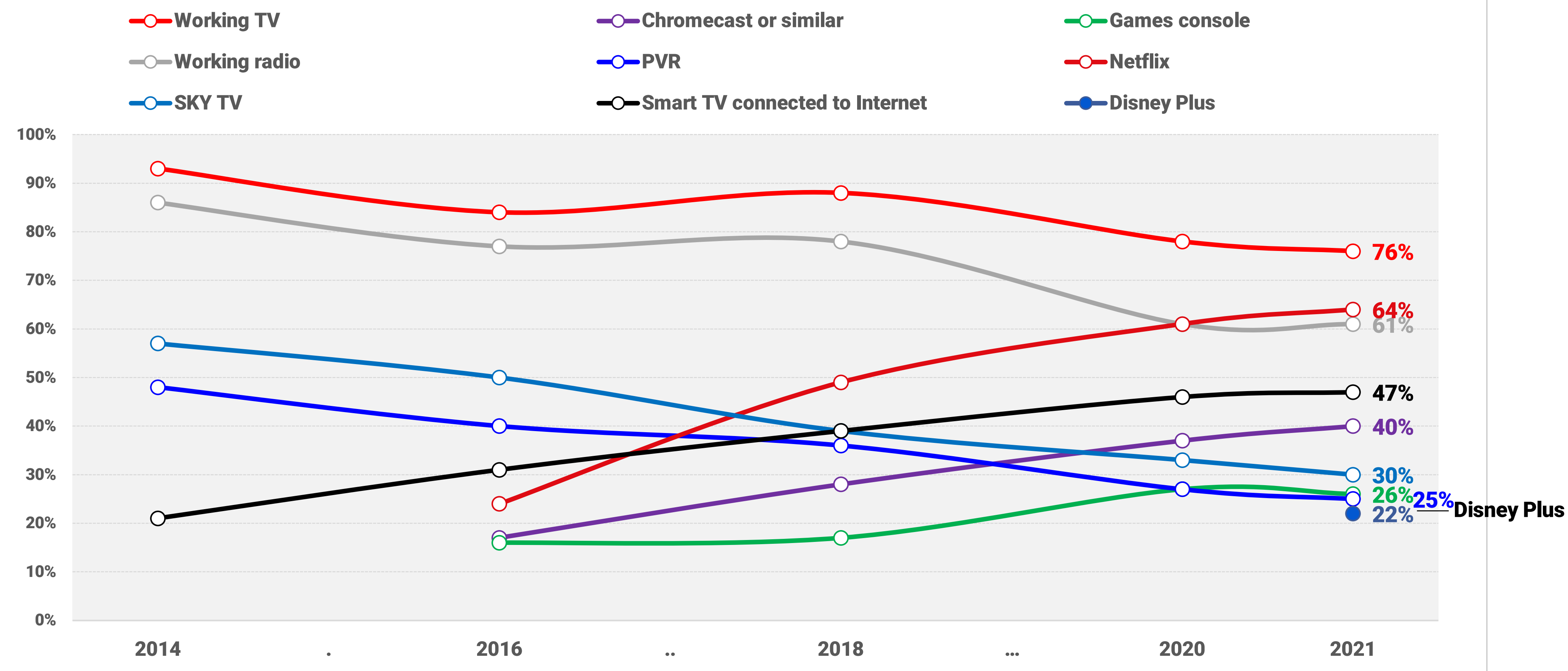
Q: Which of the following, if any, do you personally own or have daily access to?



Netflix and Chromecast or similar have continued to grow in incidence, with nearly two thirds of New Zealanders now able to access Netflix. The incidence of games consoles and smart TVs connected to the Internet has not changed since 2020. More than one in five have access to Disney Plus.

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

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



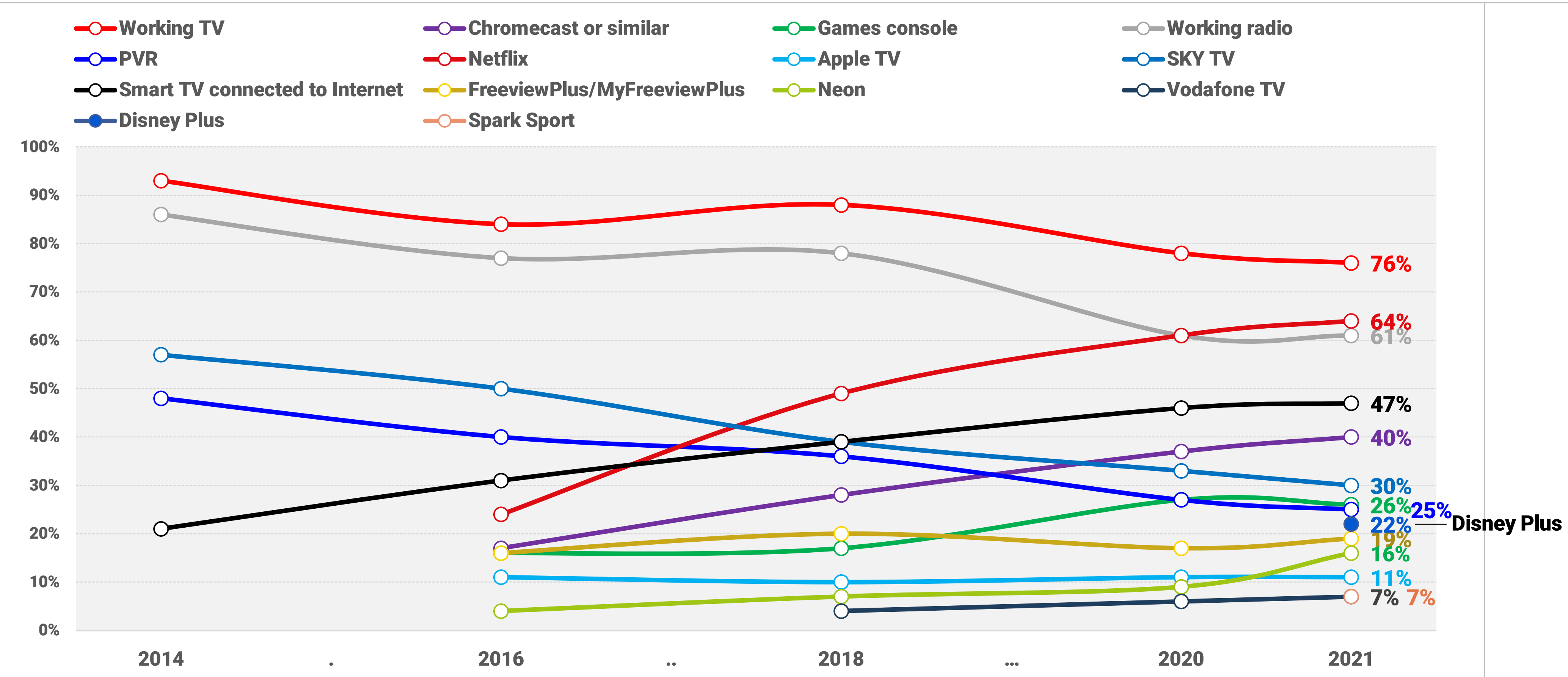
Note: 2021 is the first measure of Disney Plus.

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

FreeviewPlus/MyFreeview, Vodafone TV and Apple TV have not increased significantly in incidence since 2018. Neon is now available to 16% of New Zealanders following the merger with Lightbox, and 7% of New Zealanders have access to Spark Sport.

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

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



Note: Neon refers to the merged SVOD provider with Lightbox.

Base: All respondents: (2014 n=1,400; 2016 n=1,404; 2018 n=1,414; 2020 n=1,511; 2021 n=1,420).

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

Age/lifestage

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

Socio-economic level

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

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

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

Ethnicity

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

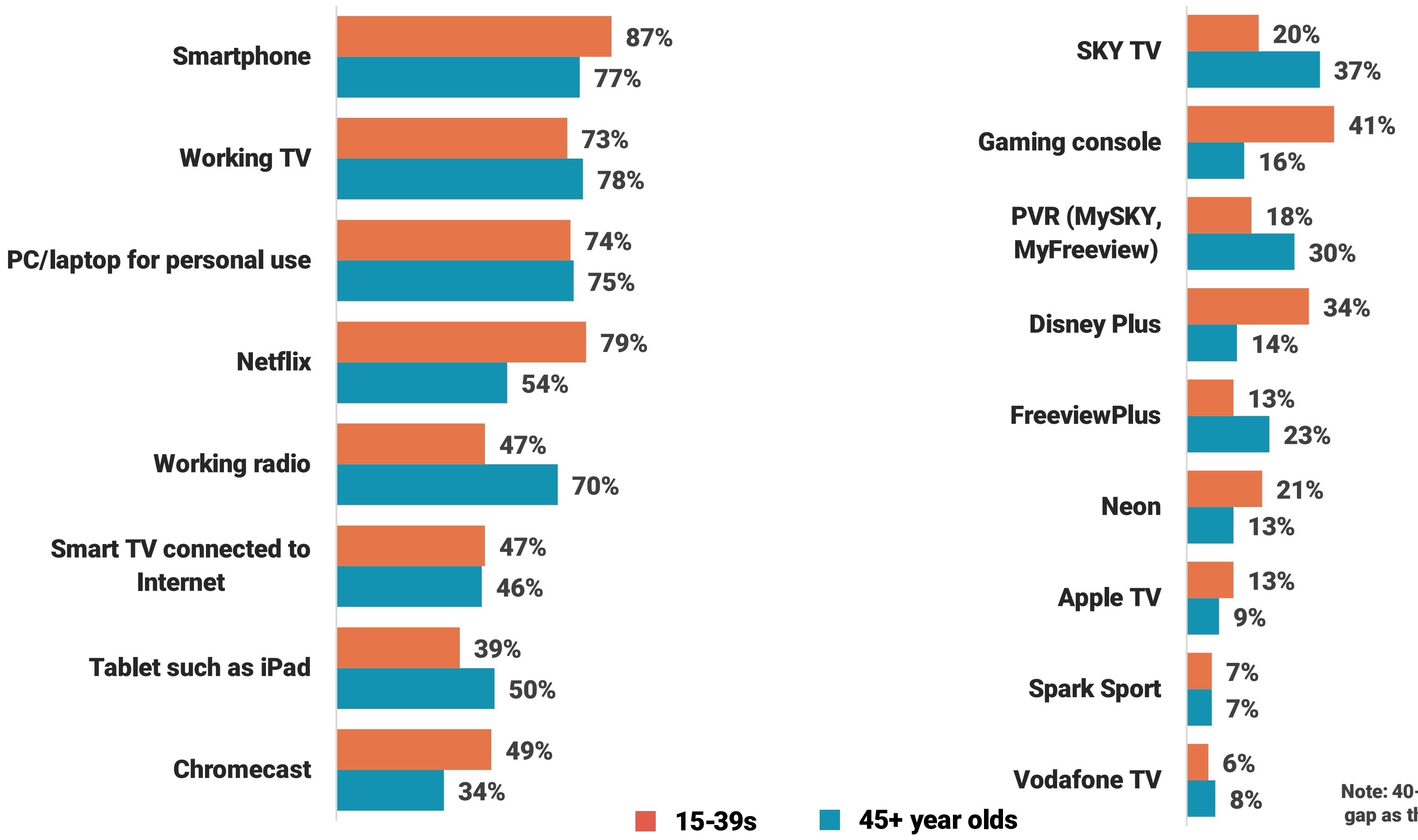
Region

- **Aucklanders are less likely to have access to a radio or SKY TV, and more likely to be able to access a smart TV connected to the Internet or a gaming console.**

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

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

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



Note: 40-44s have been deliberately excluded from this chart to better illustrate the generation gap as this age group typically demonstrate a transition between digital and traditional media.

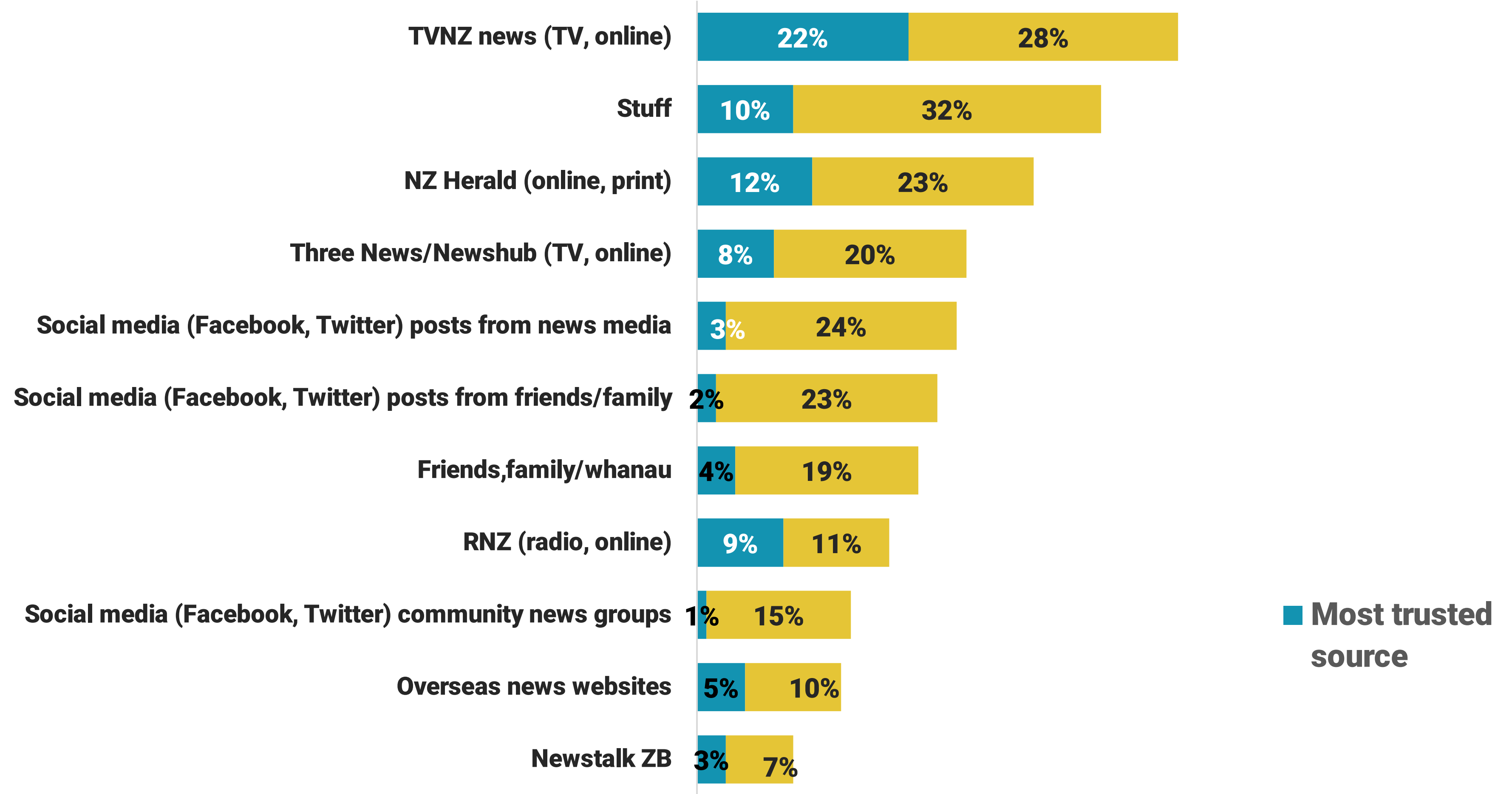
Base: All 15-39s (n=587), all 45+ year olds (n=833)

Sources of News

TVNZ News on air or online is the most widely used and trusted source of news among New Zealanders. Stuff is the second most widely used source of news, but slightly more New Zealanders trust NZ Herald (print or online). Radio NZ (on air or online) is New Zealanders' fourth most trusted source of news, followed by Three Newshub.

Sources of news and information (top sources) – All New Zealanders 15+

Q: Which of the following sources of news and information do you regularly use to keep up to date?
And of these, which is your most trusted source of news?



Most likely to trust TVNZ 1:
- Females (25% trust)
- 60+ year olds (29%)
- Māori (27%)

Profile of those most likely to trust Stuff is broad, but tends towards:
- Under 55 year olds
- South Islanders (16%)

Those most likely to trust the Herald is also broad but skews to Aucklanders (17%).

Profile of those who trust Newshub is broad with no group showing significantly higher trust.

Most likely to trust RNZ are:
- 60+ year olds (15%)
- Pakeha (11%)

Base: All New Zealanders 15+: (2021 n=1,420).

Appendix

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Linear TV **56% daily reach overall**	• 15-39 year olds (35%) – students (40%) – flatting (26%) • Young singles/couple, no kids (30%) • Pre-school families (42%) • 5+ person homes (39%) • Blue collar workers (40%) • Asian (38%) • Pasifika (45%) • Aucklanders (49%) • Games console in home (47%) • Disney Plus in home (43%)	• 50+ year olds (79%) – retirees (84%) – empty nesters (81%) – Older, living alone (74%) • 1-2 person homes (67%) • Sky TV homes (81%) • PVR homes (79%) • FreeviewPlus homes (66%) • Vodafone TV (71%) • Spark Sport in home (73%)
On demand **23% daily reach overall**	• 65+ year olds (11%) – Retirees (13%) – Older, living alone (15%) – Single person homes (16%)	• Home-makers (35%) • Unemployed (35%) • Families with kids under 15 (33%) • Higher income earners (over $120k+ = 30%) • Spark Sport in home (39%) • Vodafone TV in home (35%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Total SVOD **51% daily reach overall**	• 60+ year olds (22%) – empty nesters (36%) – older, living alone (18%) – retiree (19%) – single person homes (25%) • Lower income earners ($20-$50,000 – 40%) • SKY TV homes (40%)	• 15-39 year olds (72%) – Esp. 15-24s (76%) – students (71%) – flatting (61%) • Young singles/couples, no kids (67%) • Families with kids under 15 (66%) – 4+ person homes (65%) • High income earners ($150k+ - 64%) • Asian (68%) • Pasifika (63%) • Aucklanders (56%) • Chromecast (64%) • Smart TV connected to internet (62%) • Games console (69%)
Online Video **59% daily reach overall**	• 60+ year olds (26%) – retirees (24%) – empty nesters (41%) – Older, living alone (31%) – 1-2 person homes (47%) • Lower income earners (up to $20k = 33%) • SKY TV homes (50%)	• 15-39 year olds (82%) – 15-24s (91%) – students (95%) – flatting (79%) • Young singles or couples, no kids (77%) • Families (69%) – 3+ people homes (74%) • Solo parents (73%) • Blue collar workers (68%) • Asian (84%) • Pasifika (72%) • Aucklanders (65%) • Chromecast (71%) • SVOD homes (66%) • Games console in home (74%) • Smart TV connected to Internet (68%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Radio **47% daily reach overall**	• 15-44 year olds (38%) – 15-29s (31%) – students (27%) – flatting (32%) • Young singles or couples, no kids (30%) • 4+ person homes (41%) • Unemployed (32%) • Lowest income earners (up to $20k – 33%) • Asian (37%) • Pasifika (35%) • Games console in home (35%)	• 60+ year olds (65%) – empty nesters and older singles (59%) – retirees (64%) • High income earners ($120k+ = 56%) • SKY TV homes (60%) • PVR homes (60%)
Online NZ Radio **9% daily reach overall**	• Home-makers (5%) • Unemployed (5%) • Lowest income earners (up to $20,000 – 5%)	• Upper white collar workers (13%) • High income earners ($120k+ = 15%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Music Streaming **41% daily reach overall**	• Females (39%) • 45+ year olds (23%) – 60+ year olds (10%) – retirees (7%) – empty nesters and older singles (17%) – 1-2 person homes (28%) • Home-makers (32%) • Lower income earners ($20-$30,000 – 26%) • Pakeha (35%) • SKY TV homes (35%) • PVR homes (36%)	• Males (44%) • 15-39 year olds (68%) – 15-24s (81%) – students (84%) – flatting (67%) • 3+ people homes (55%) • Young singles and couples, no kids (62%) • Families (51%) • Solo parents (50%) • Lowest income earners (up to $20,000 – 53%) • Blue collar workers (49%) • Asian (64%) • Pasifika (55%) • Māori (48%) • Chromecast (53%) • Smart TV connected to internet (47%) • SVOD homes (49%) • Games console in home (61%)
Music on CDs/iPod/vinyl **10% daily reach overall**	• 25-34 year olds (4%)	• 40+ year olds (13%)

What is the daily profile of consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
Podcasts 13% daily reach overall	• 60+ year olds (4%) • Retirees (3%) • Empty nesters (4%) • Home-makers (5%)	• Males (15%) • 15-29s (21%) – students (18%) • Young singles/couples, no kids (23%) • Upper white collar workers (17%)
Online gaming 32% daily reach overall	• 55+ year olds (22%) – retirees (21%) – single person homes (20%)	• 15-24 year olds (48%) – students (50%) – 5+ person homes (41%) • Solo parents (47%) • Unemployed (47%) • Pasifika (43%) • Māori (40%)

Daily profile of audiences on key content providers

TVNZ 1 (41% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 15-44s (19%) – students (25%) – flatting (17%) • Young singles/couples, no kids (18%) • Families (33%) – Pre-school families (18%) • 4+ person homes (28%) • Blue collar workers (30%) • Asian (29%) • Pasifika (26%) • SVOD homes (39%) • Games console in home (29%)	• 55+ year olds (69%) – retirees (75%) – empty nesters and older singles (65%) – 1-2 person homes (54%) • Mid-income earners ($20-$50k = 50%) • South Islanders (46%) • Radio in home (51%) • SKY TV homes (58%) • PVR homes (59%) • Vodafone TV (53%)

TVNZ 2 (14% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• Flatting (6%) • Asian (7%)	• Unemployed (24%) • Māori (21%) • PVR homes (20%) • Vodafone TV (25%)

THREE (20% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 15-39s (10%) – students (11%) – flatting (6%) • Young singles/couples, no kids (6%) • 5+ person homes (13%) • Pasifika (9%)Asian (13%)	• 45+ year olds (27%) – retirees (28%) – empty nesters (32%) • SKY TV homes (28%) • MyFreeview homes (26%) • PVR homes (30%) • Spark Sport (32%) • Vodafone TV (31%)

PRIME (7% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 15-44s (3%) – students (1%) – flatting (2%) • Young singles/couples, no kids (2%) • 5+ person homes (3%) • Lower white collar workers (4%) • Blue collar workers (5%) • Pasifika (1%)	• 60+ year olds (14%) – retirees (13%) – empty nesters and older singles (12%)

Daily profile of audiences on key content providers

NETFLIX (40% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 50+ year olds (25%) – 60+ year olds (16%) – retirees (14%) – Older singles/couples, no kids (22%) – Single person homes (20%) • Lower income earners ($20-$30,000 – 28%) • SKY TV homes (33%)	• 15-44 year olds (55%) – 15-24s (62%) – students (61%) – flatting (50%) • Double income couples, no kids (59%) • Families (49%) – 3+ person homes (42%) • Solo parents (51%) • Home-makers (46%) • Upper collar workers (46%) • High income earners ($120k+ - 48%) • Asian (52%) • Pasifika (51%) • Smart TV connected to Internet (51%) • Chromecast homes (51%) • Game console in home (54%) • Spark Sport (47%)

YouTube - for video (40% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• Females (34%) • 45+ year olds (28%) – 60+ year olds (19%) – retirees (17%) – Older singles/couple, no kids (25%) – 1-2 person homes (32%) • Home-maker (32%) • Pakeha (34%) • SKY TV homes (30%) • PVR homes (41%)	• Males (47%) • 15-39 year olds (57%) – 15-24s (62%) – students (65%) – flatting (53%) – Young singles/couples, no kids (54%) • Families with kids 15+ (49%) – 3+ person homes (47%) • Unemployed (51%) • Blue collar workers (47%) • Asian (71%) • Pasifika (48%) • Aucklanders (47%) • Chromecast homes (51%) • Smart TV connected to Internet (46%) • Games console (51%)

Daily profile of audiences on key content providers

SPOTIFY (27% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 45+ year olds (14%) – 60+ year olds (5%) – retirees (3%) – empty nesters (9%) – 1-2 person homes (13%) • Lower income earners ($20-$50,000 – 19%)	• 15-34 year olds (53%) – 15-24s (62%) – students (65%) – flatting (47%) • Young singles/couples, no kids (43%) • Families with kids 15+ (34%) • Solo parents (34%) • 3+ person homes (36%) • Lowest income earners (up to $20,000 – 36%) • Chromecast homes (36%) • SVOD homes (33%) • Games console in home (45%)

TVNZ OnDemand (17% overall)

LESS LIKELY TO WATCH	MORE LIKELY TO WATCH
• 65+ year olds (6%) – Retirees (7%)	• 45-54s (27%) • Home-makers (24%) • Families with kids under 15 (28%) • Highest income earners ($120,000+ - 23%) • Chromecast homes (22%) • Spark Sport (29%) • Vodafone TV (29%)

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
Working TV **76% overall**	• Flatting (69%) • Young singles/couples, no kids (65%) • Pre-school families (66%) • Asian (65%)	• 55+ year olds (83%) – retirees (82%) • Highest income earners ($120,000+ - 84%) • Working radio (90%) • Chromecast in home (85%) • Games console (87%)
Radio **61% overall**	• 15-44 year olds (48%) – students (52%) – flatting (30%) • Single & double income couples, no kids (37%) • 5+ person homes (48%) • Families with pre-school kids (41%) • Blue collar workers (54%) • Home-maker (46%) • Lowest income earners (up to $20,000 – 47%) • Asian (39%) • Pasifika (47%) • Aucklanders (55%)	• 55+ year olds (79%) – 65+ year olds (84%) – retirees (84%) – empty nesters & older singles (72%) – Single person homes (68%) • Families with school aged kids (70%) • Higher income earners ($120k+ = 70%) • Pakeha (66%) • Maori (66%) • Working TV (71%) • SKY TV (74%) • PVR (81%)
SKY TV **30% overall**	• 15-34 year olds (21%) – students (17%) – flatting (8%) • Single & double income young couples, no kids (12%) • Families with kids under 15 (14%) • 4+ person homes (23%) • Low income earners (up to $20,000 – 13%) • Unemployed (17%) • Asian (13%) • Aucklanders (26%)	• 60+ year olds (45%) – empty nesters (46%) – retirees (43%) • Families with kids 15+ (37%) • Upper white collar workers (36%) • Higher income earners ($120k+ = 36%) • Māori (39%) • Spark Sport (61%)

What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
PVR **25%**	• 25-39 year olds (12%) – flatting (4%) • Young singles & couples, no kids (8%) • Solo parents (12%) • Lowest income earners (up to $20k = 13%) • Unemployed (13%) • Asian (14%)	• 45+ year olds (35%) – empty nesters (33%) • Families with kids aged 15+ (42%) • High income earners ($120k+ = 34%) • Māori (32%) • Smart TV connected to Internet (33%) • Spark Sport (46%)
Smart TV connected to internet **47% overall**	• 60+ year olds (37%) – retirees (38%) – older singles (29%) – single person homes (31%) • Low income earners (up to $30k = 29%) • Flatting (34%) • Students (40% • Solo parents (35%) • Young singles/couples, no kids (36%) • Unemployed (37%)	• 30-59 year olds (55%) • Upper white collar workers (57%) • Lower white collar workers (54%) • High income earners ($120k+ = 69%) • Families with kids (56%) • Aucklanders (52%) • Tablet (61%) • PVR (62%) • Chromecast (57%) • Games console (65%)
Chromecast **40% overall**	• 65+ year olds (21%) – retirees (22%) – Older singles, no kids (20%) – single person homes (23%)l • Lower income earners (up to $50,000 – 30%)	• 15-44 year olds (49%) • 4+ person homes (50%) • Families with kids 15+ (51%) • Young couples, no kids (51%) • Students (48%) • Flatting (52%) • High income earners ($120k+ = 55%) • PVR (49%) • SVOD home (48%) • Smart TV connected to Internet (49%) • Games console (58%)

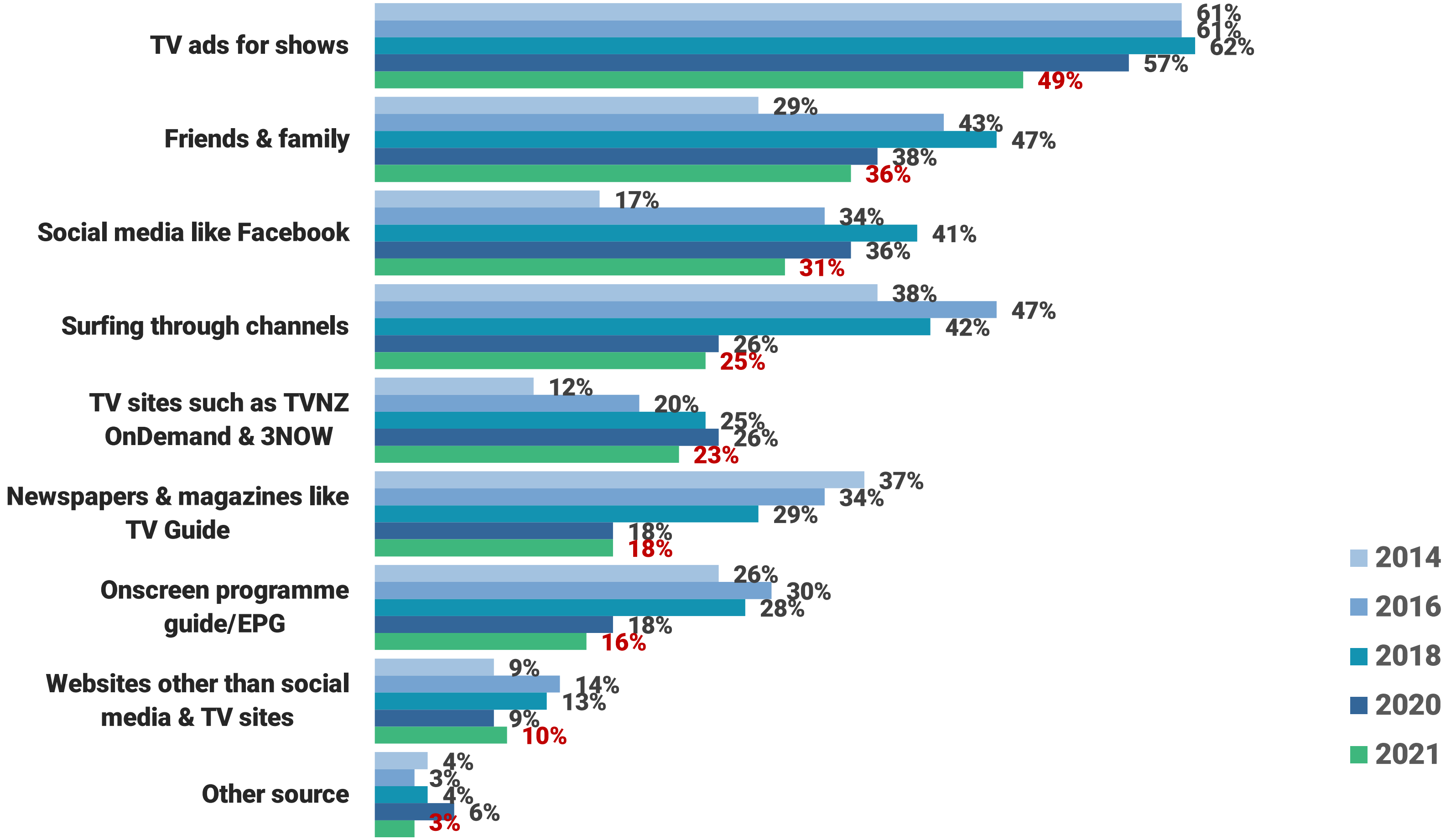
What is the profile of users of key technology?

MEDIA	LESS LIKELY TO OWN/ACCESS	MORE LIKELY TO OWN/ACCESS
Games console **26% overall**	• Females (21%) • 45+ year olds (16%) – 60+ year olds (4%) – retirees (2%) – empty nesters (6%) – 1-2 person homes (12%) • Home-makers (20%) • Lower income earners (up to $50k+ = 19%) • South Islanders (21%)	• Males (32%) • 15-44 year olds (43%) – 15-24s (49%) – Students (42%) • Young couples, no kids (36%) • Families (41%) – Families with school aged kids (47%) • Solo parents (42%) • 3+ person homes (41%) • Blue collar workers (34%) • Unemployed (39%) • Highest income earners ($150,000+ = 40%) • Māori (33%) • Pasifika (35%) • Aucklanders (31%) • Tablet (33%) • Smart TV connected to Internet (37%) • Chromecast (37%) • Spark Sport (48%)

Promos on TV remain the primary source of information about NZ made TV shows, followed by word of mouth and social media. However as TV audiences decline overall, usage of nearly all sources of information have also declined – particularly TV promos in 2021.

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

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



- **The sources that were showing increased influence such as social media and on demand have now declined as a source of information.**
- **The ongoing decline in influence of social media suggests there is now less social talk about NZ made TV shows.**

Base: All New Zealanders 15+: (2021 n=1,420).


Glasshouse
NZ On Air
Irirangi Te Motu
Thank you