WHERE ARE THE AUDIENCES?

Lower socio-economic report

AUGUST 2021

Introduction

- Te Hiringa Hauora aims to inspire all New Zealanders to lead healthier lives. It leads and delivers innovative, high quality and cost-effective programmes in the following areas:
  - Alcohol, health education resources, immunisation, mental health, minimising gambling harm, nutrition and physical activity, skin cancer prevention, tobacco control, workplace well-being.

- It achieves these objectives by:
  - Promoting health and well-being
  - Enabling health promotion initiatives and environments
  - Informing health promotions policy and practice

- Therefore effectively reaching key New Zealand audiences is critical to achieving Te Hiringa Hauora's objectives and mission. New Zealand On Air's (NZ On Air) "Where Are The Audiences?" study is an important input for Te Hiringa Hauora to understand how to reach New Zealanders overall and harder to reach audiences in particular. These audiences are:
  - 15-24 year olds
  - Māori
  - Pacific Island peoples
  - Lower socio-economic groups

- This report summarises NZ On Air's 2021 "Where Are The Audiences?" study based on lower socio-economic groups.
  - It compares the 2021 results to all previous studies among lower socio groups, as well as comparing to the 2021 results among all New Zealanders.

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 Covid 19 levels 4 and 3 which commenced on March 26. Interviewing was then conducted while New Zealand was at Covid 19 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 among lower socio-economic groups in 2020, mainly impacting some digital media.
- For some digital media the impact is reflected in slightly boosted time spent using those media. In particular this can be seen in the slight boost and then decline in time spent using SVOD, online gaming, and streamed music.
- There was little observable effect on audience sizes due to Covid levels 1 and 2 conditions.
- Overall therefore the specific impact of Levels 1 and 2 on 2020 audience behaviour was relatively minor among lower socio-economic groups 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 three 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.

- The NZ On Air main study developed a total sample of n=1,420 New Zealanders aged 15 and over, with representative samples created for each day of the week so that results can be accurately extrapolated to represent a "typical" day.

- The study included a sub-sample of N=223 New Zealanders from lower socio-economic groups on which this report is based.

- The total sample has a maximum margin for error of +/-2.6%, and the sample of lower socio-economic groups has a maximum margin for error of +/-6.5%.

Research Approach

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

- **Results have been compared to all New Zealanders 15+ and to previous results among lower socio-economic groups.**
  - **No comparison to the 2016 study is possible as the income questions were asked in a different way prior to 2018.**

Research Approach

- As in all previous studies a mixed methodology of telephone and online interviewing was used to conduct the main NZ On Air study.
- 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 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 ethnicity were implemented.
- The total sample was post-weighted by the following factors to ensure it was representative of the 15+ NZ population;
  - Access to a landline, gender, age, ethnicity.

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.**

- **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 data is based on 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

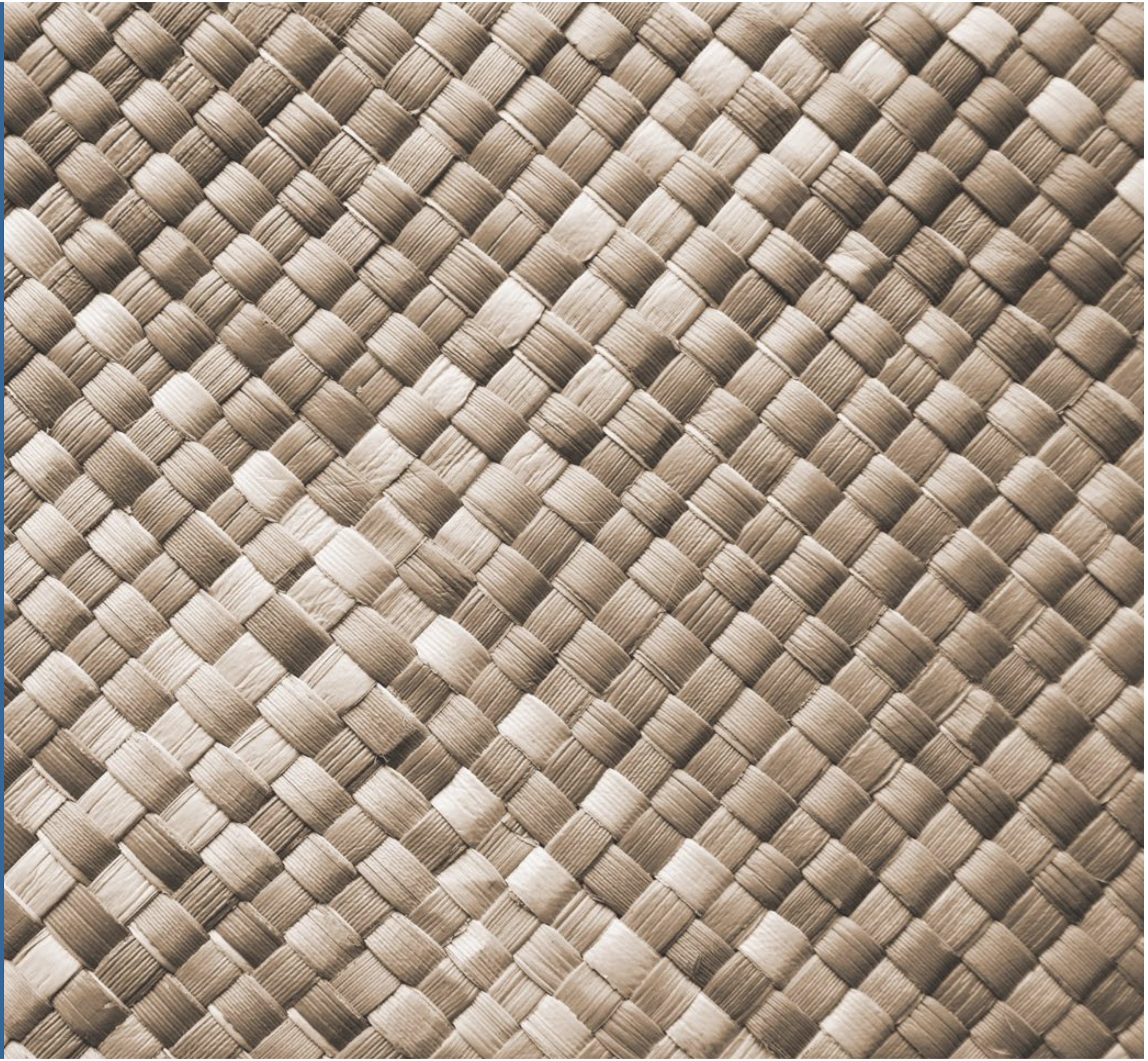
- **The weekly reach question was removed from the study in 2021 due to interview length constraints.**
- **Neon and Lightbox merged after the 2020 study. The results for "Neon" represent the merged provider in 2021.**
- **The news provider question has been adjusted to ask about news consumption in 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



Overall Summary

- On many measures the daily media behaviour of lower socio-economic groups is not significantly different to overall New Zealanders 15+. This means that digital media overall now reaches a bigger daily audience among this group than traditional media.
- Online video attracts the biggest daily audience among lower socio-economic groups each day, followed by SVOD. The audience listening to streamed music is also very slightly larger than TV viewing.
- With the exception of growth in the SVOD audience the fact that digital media now attracts a bigger audience than traditional media is more driven by ongoing declines in traditional media than growth in digital media.
- In the case of TV viewing this decline is driven mainly by a significant drop in the proportion of lower socio audiences who watch TV via a pay TV platform and who have access to SKY TV.
- There are indications that lower socio-economic audiences have switched their subscriptions from SKY TV to SVOD and particularly to Netflix.
- Time spent using all media except online video has declined since 2020. TV continues to attract the most time per day among lower socio-economic groups, followed by SVOD and online video.

Overall Summary

- **In terms of content providers, YouTube (for video) continues to attract the biggest daily audience among lower socio audiences despite a significant decline since 2020. Netflix has continued to grow its audience and now attracts the second biggest daily audience among this group. Other top providers (e.g. TVNZ 1, Facebook (for video) and Three) also show declines in daily audiences among lower socio-economic groups.**

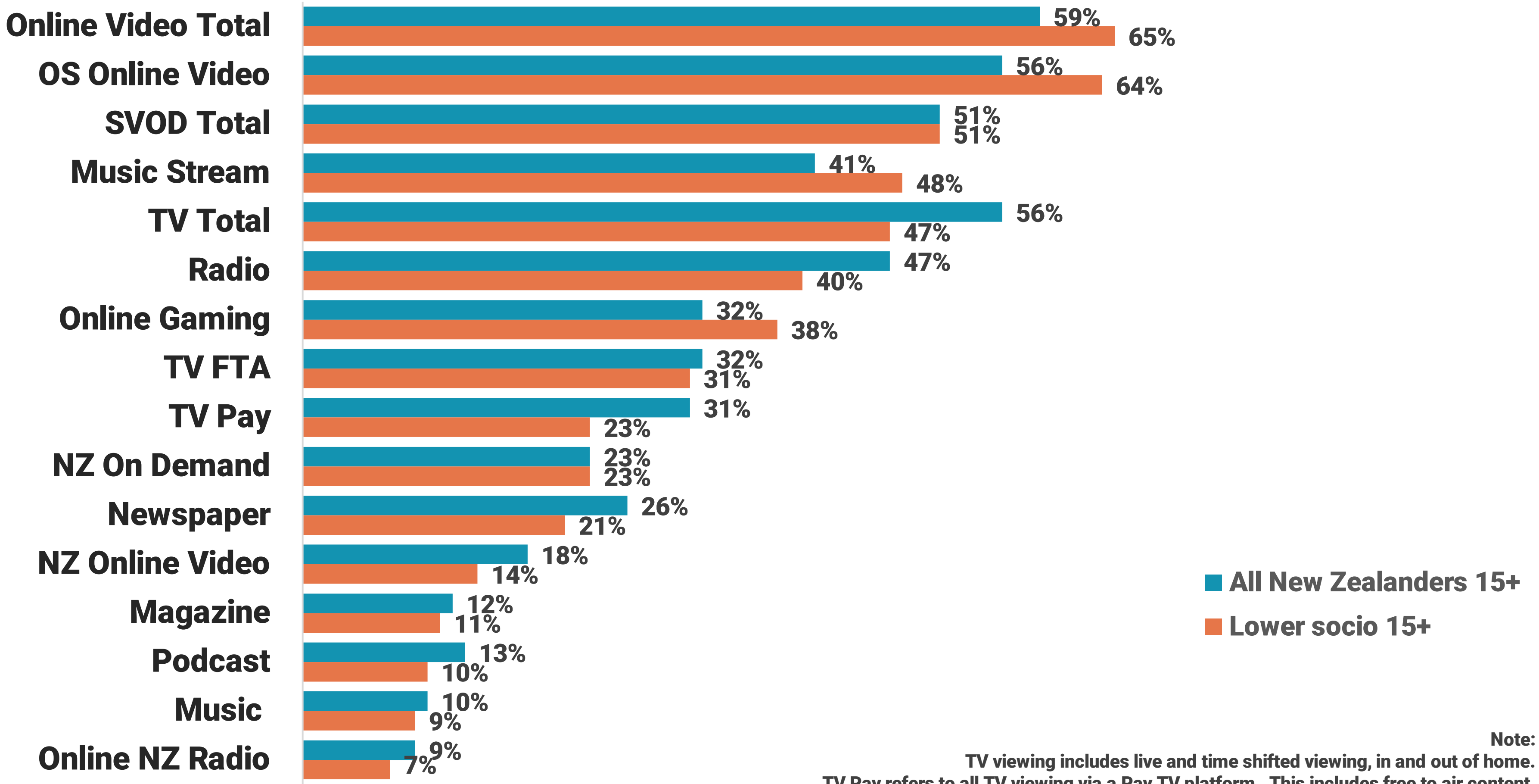
- **Lower socio audiences have less access to nearly all devices and platforms that enable access to media.**

- **TVNZ News is the most widely used and trusted source of news among lower socio audiences. Stuff, NZ Herald and Three Newshub are equally second most trusted.**

Daily reach 2021. The overall daily media use of lower socio groups is relatively similar to the behaviour of New Zealanders 15+ overall compared to other harder to reach audiences such as youth and Pasifika. Online video attracts the biggest daily audience among lower socio-economic groups, followed by SVOD, music streaming and TV.

Daily reach of media 2021 – All New Zealanders 15+ and lower socio 15+.

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



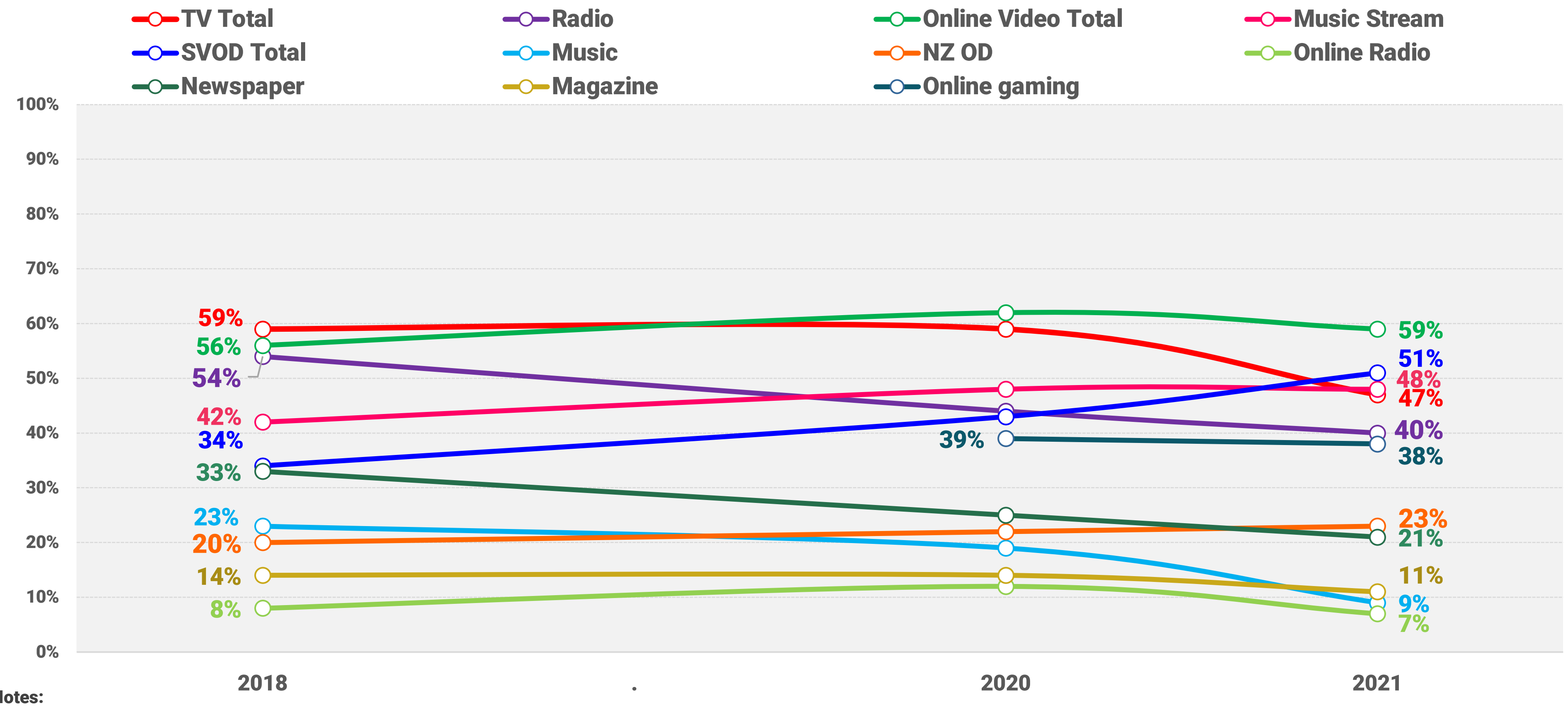
Note:
TV viewing includes live and time shifted viewing, in and out of home.
TV Pay refers to all TV viewing via a Pay TV platform. This includes free to air content.

Base: All New Zealanders 15+ (n=1,420); All lower socio (n=223).

Daily reach over time. The audience watching online video and listening to streamed music is stable since 2020, but there has been a significant decline in the audience watching TV – driven mainly by a decline in viewing via a pay TV platform. Conversely there has been a significant increase in the lower socio-economic audience watching SVOD each day.

Daily reach of media over time – All lower socio 15+.

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

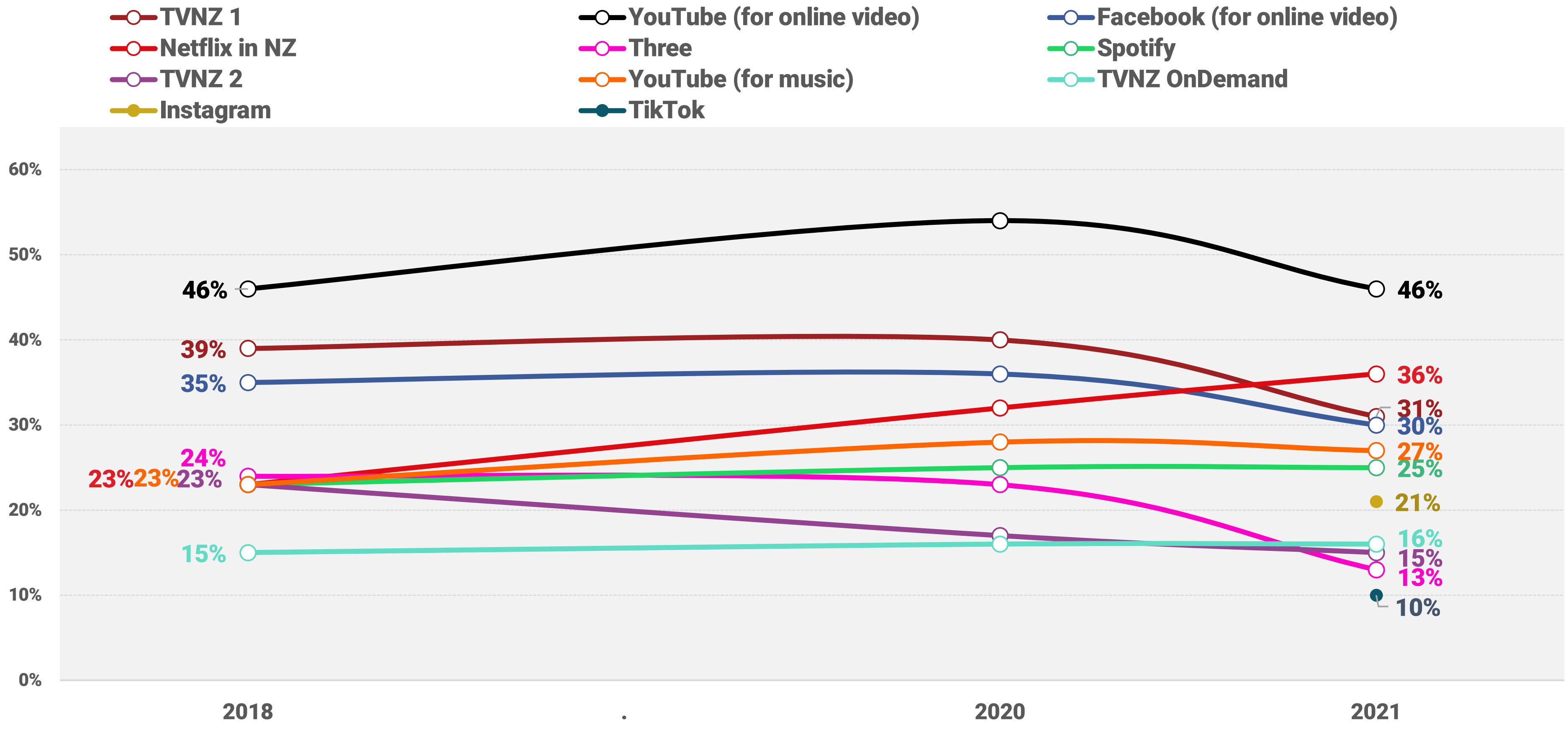


Notes:
TV viewing includes live and time shifted viewing, in and out of home.
Unable to compare to 2016 due to 2018 change in how income question was asked.
TV Pay refers to all TV viewing via a Pay TV platform. This includes free to air content.

Most popular channels, sites and stations 2021. Netflix is the only main provider to show audience growth among lower socio-economic groups since 2020 and is now the second most popular provider. YouTube (for video), TVNZ 1, Facebook (for video) and Three all show significant declines, with the remaining top providers stable.

Most popular channels, sites & stations 2021 – all lower socio 15+ (10% reach and above)

Q: Which of the following did you use yesterday?



Next tier:

• Stuff (for video)	8%
• Prime	7%
• Herald (for video)	7%
• Disney Plus	7%
• Amazon Prime	7%
• 3NOW	7%
• Mai FM	7%
• Snapchat	7%

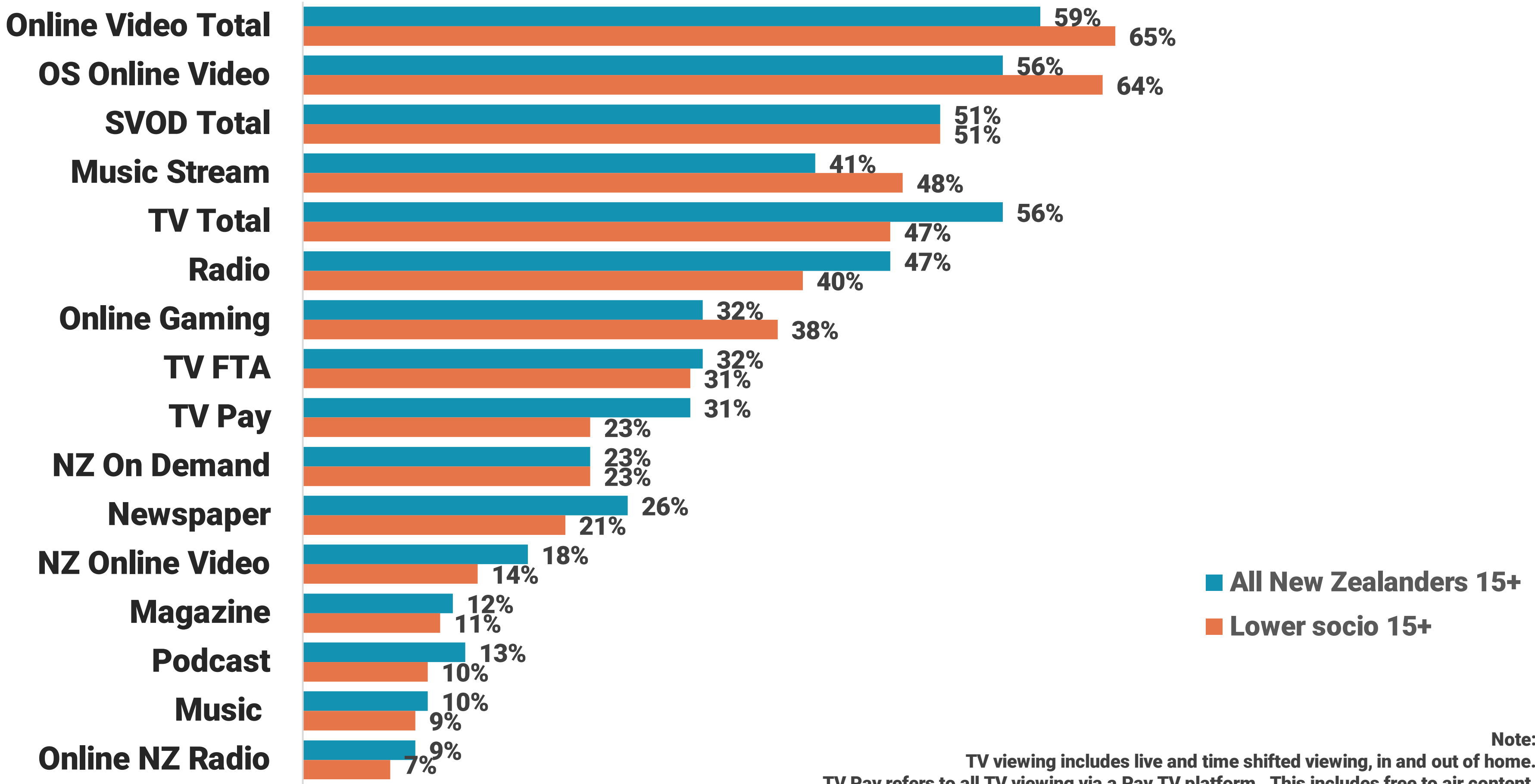
Base: All respondents: (2018 n=235; 2020 n=275; 2021 n=223)

Daily Media Consumption

The overall daily media use of lower socio groups is relatively similar to the behaviour of New Zealanders 15+ overall compared to other harder to reach audiences such as youth and Pasifika. Online video attracts the biggest daily audience among lower socio-economic groups, followed by SVOD, music streaming and TV.

Daily reach of media 2021 – All New Zealanders 15+ and lower socio 15+.

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



- Lower socio-economic groups are more likely to watch online video, predominantly overseas video, SVOD , and listen to streamed music
- This audience are less likely to watch TV and listen to the radio compared to overall New Zealanders 15+.

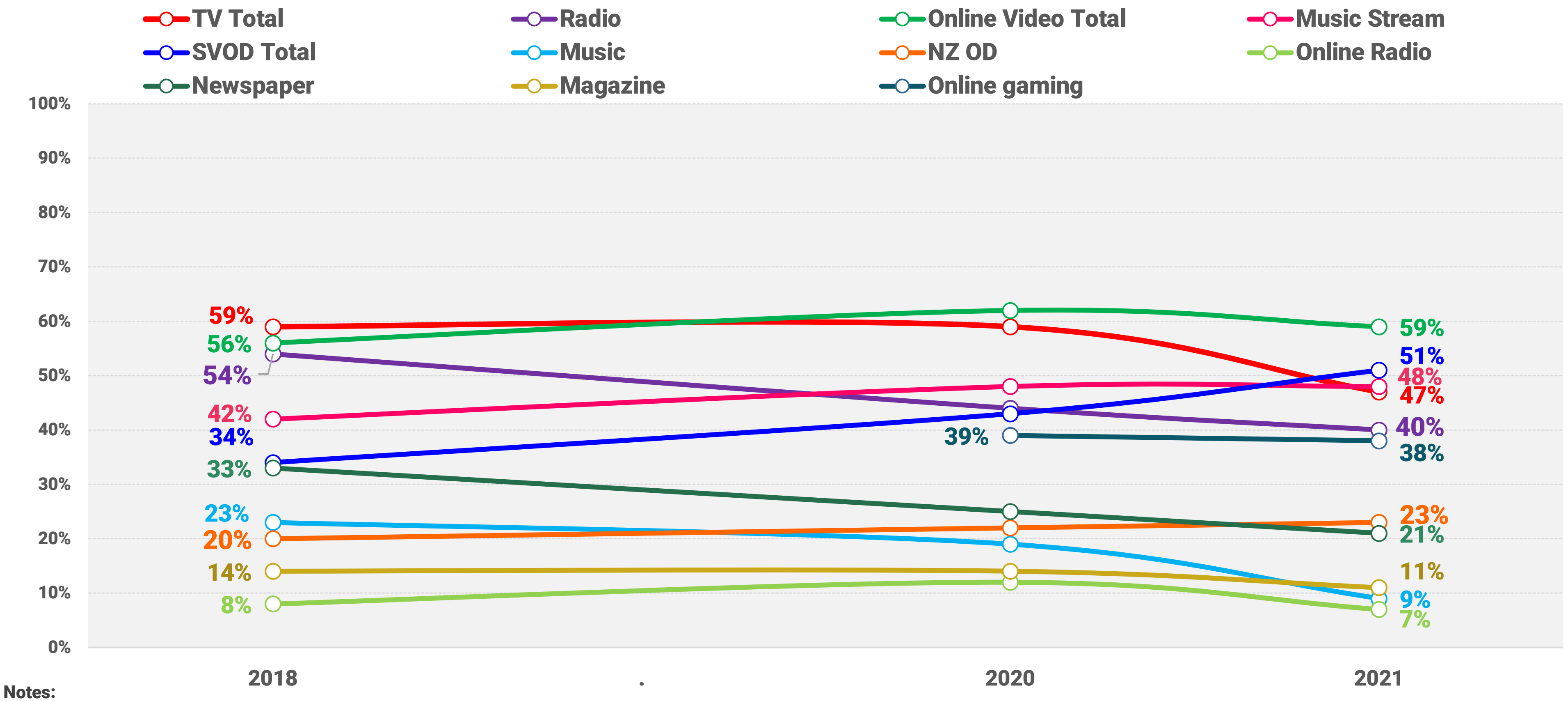
Note:
TV viewing includes live and time shifted viewing, in and out of home.
TV Pay refers to all TV viewing via a Pay TV platform. This includes free to air content.

Base: All New Zealanders 15+ (n=1,420); All lower socio (n=223).

The audience watching online video and listening to streamed music is stable since 2020, but there has been a significant decline in the audience watching TV – driven mainly by a decline in viewing via a pay TV platform. Conversely there has been a significant increase in the lower socio-economic audience watching SVOD each day.

Daily reach of media over time – All lower socio 15+.

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



The decline in daily audience reach via a pay TV platform and the increase in daily reach of SVOD suggests that some audiences within lower socio groups have switched their subscription fees from SKY TV to an SVOD provider in the last 12 months.

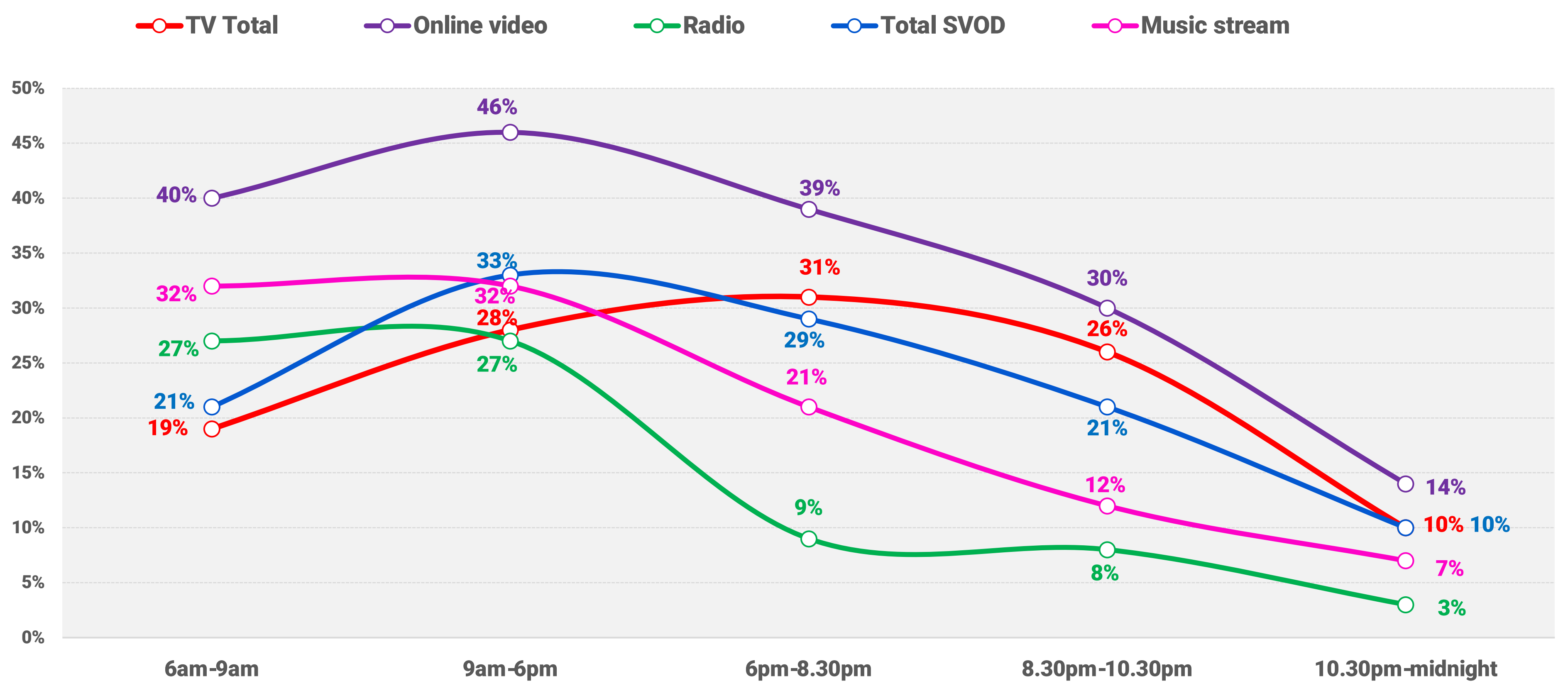
Notes:
TV viewing includes live and time shifted viewing, in and out of home.
Unable to compare to 2016 due to 2018 change in how income question was asked.
TV Pay refers to all TV viewing via a Pay TV platform. This includes free to air content.

Base: All lower socio: (2018 n=235; 2020 n=275; 2021 n=223).

The way lower socio groups use media changes over the day, although online video now captures the biggest audience throughout the day. Music streaming and radio capture about three in ten at the very start of the day, before these media, TV and SVOD compete equally for this audience. TV attracts its biggest audience during the traditional peak time of 6-10.30pm, with SVOD below this.

Reach of media over the day 2021 – all lower socio 15+.

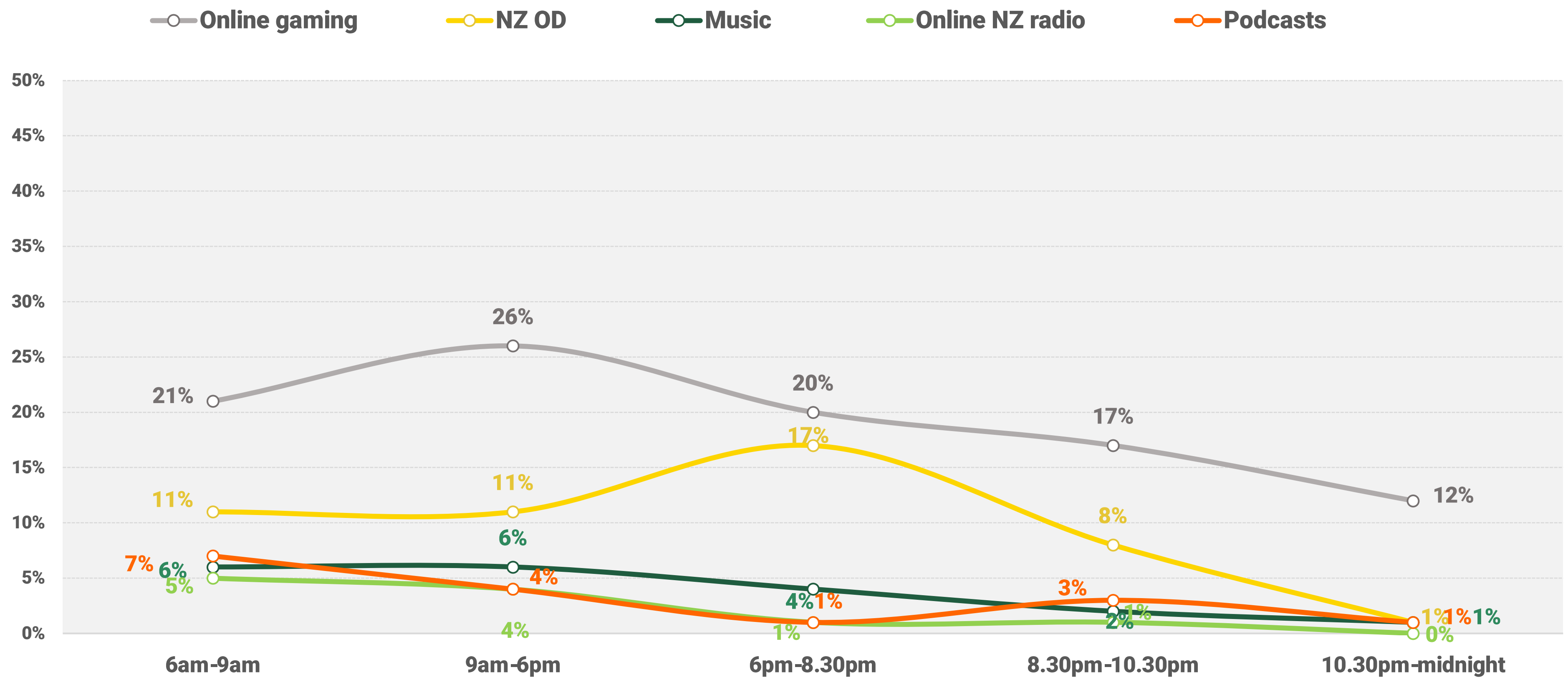
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Online gaming attracts a slightly smaller audience each day than SVOD. On demand is the only other media to reach one in ten or more of lower socio groups during any period of the day.

Reach of media over the day 2021 – all lower socio 15+.

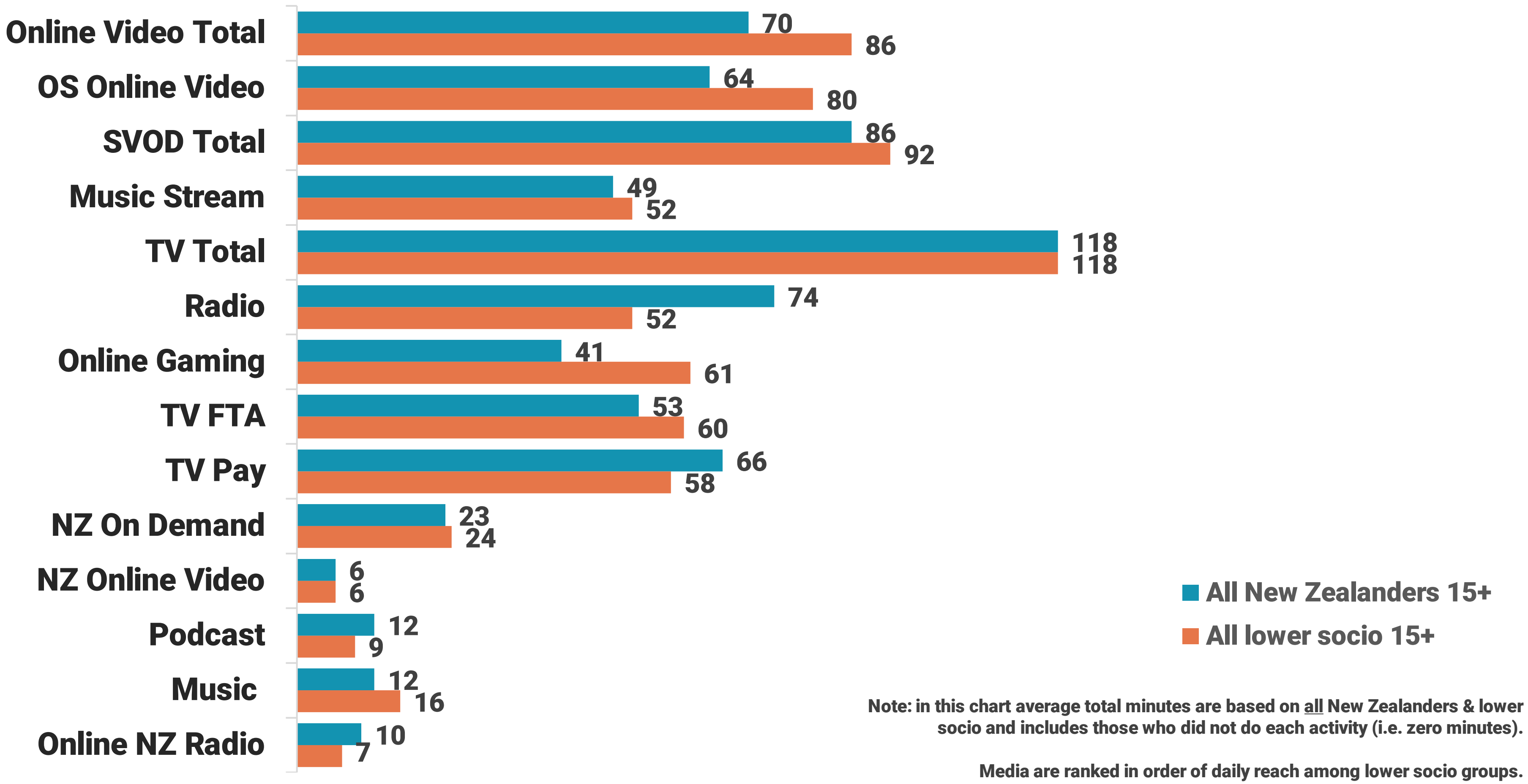
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



While online video and SVOD attract the biggest audiences each day, lower socio groups dedicate the most time to watching TV – about 2 hours. SVOD and online video receive the second most time each day (about 1½ hours), with music streaming, radio and online gaming each receiving about an hour of time each day.

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

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



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

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

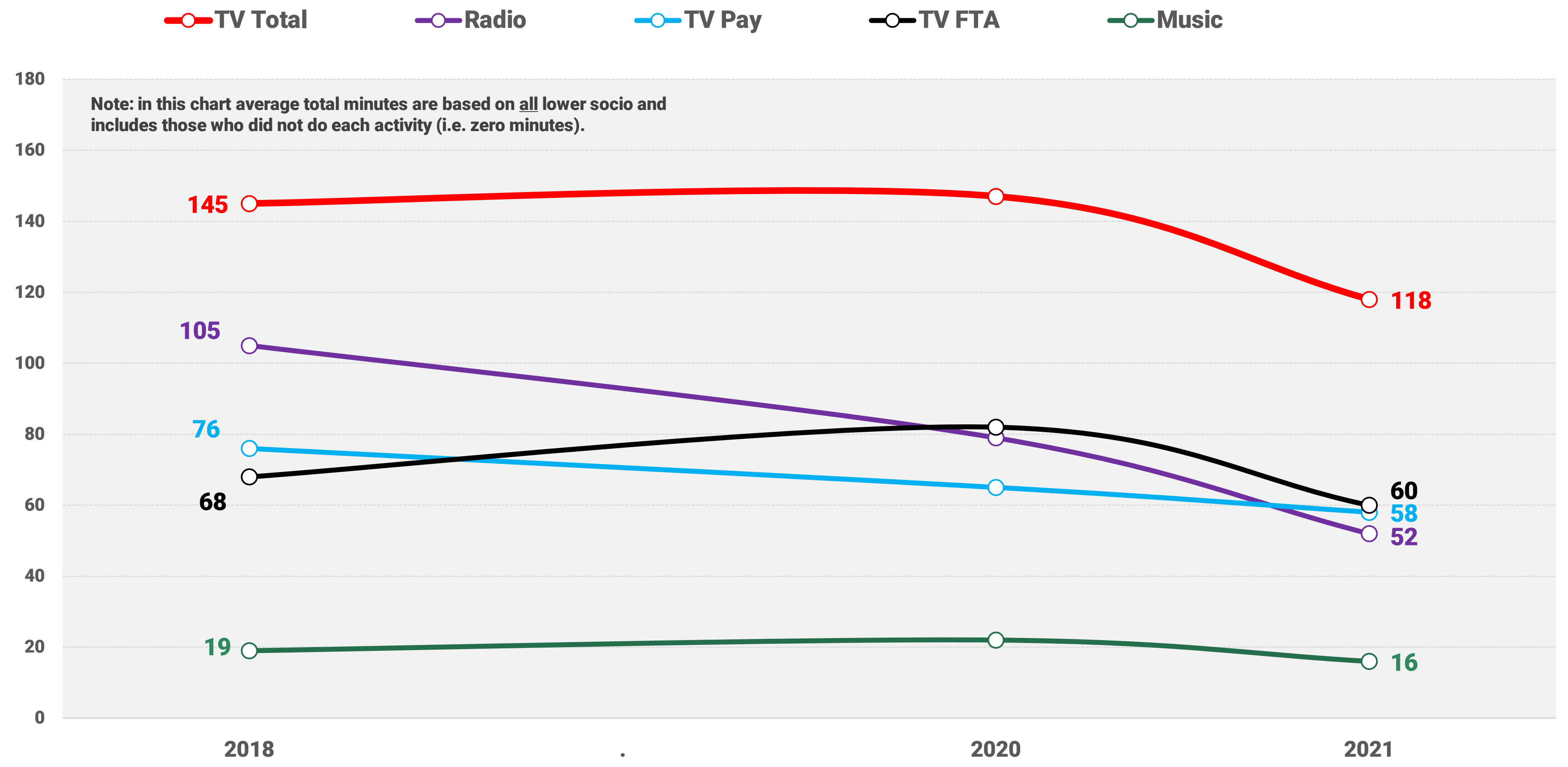
Time spent watching online video is almost entirely made up of viewing video on overseas sites.

Base: All New Zealanders 15+: (2020 n=1,420); all lower socio 15+ (n=223).

Time spent watching TV overall has declined significantly since 2020, driven mainly by a decline in time spent watching TV via a free to air platform. The time lower socio groups spend listening to the radio and, to a lesser extent, music on physical formats has also declined significantly.

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

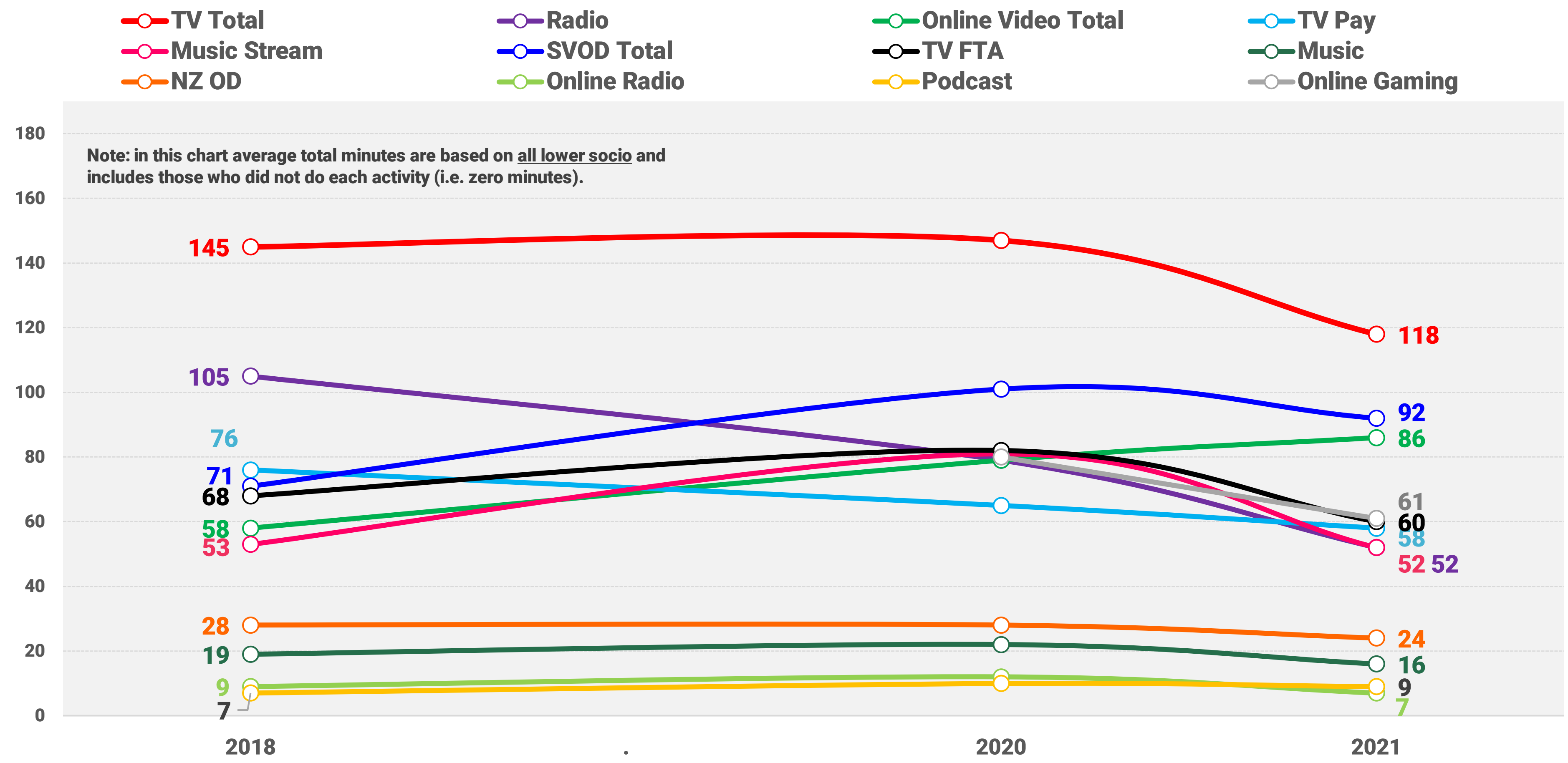
Q: Between (TIME PERIOD) about how long did you do (activity) for?



Online video is the only media which shows a significant increase in the time lower socio-economic groups spend using media. SVOD shows a small decline since 2020 but lower socio-economic groups are now dedicating significantly less time to listening to streamed music and playing online games since 2020.

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

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



There is evidence of a boost in time spent consuming media in 2020 due to Covid 19 levels 1 and 2.

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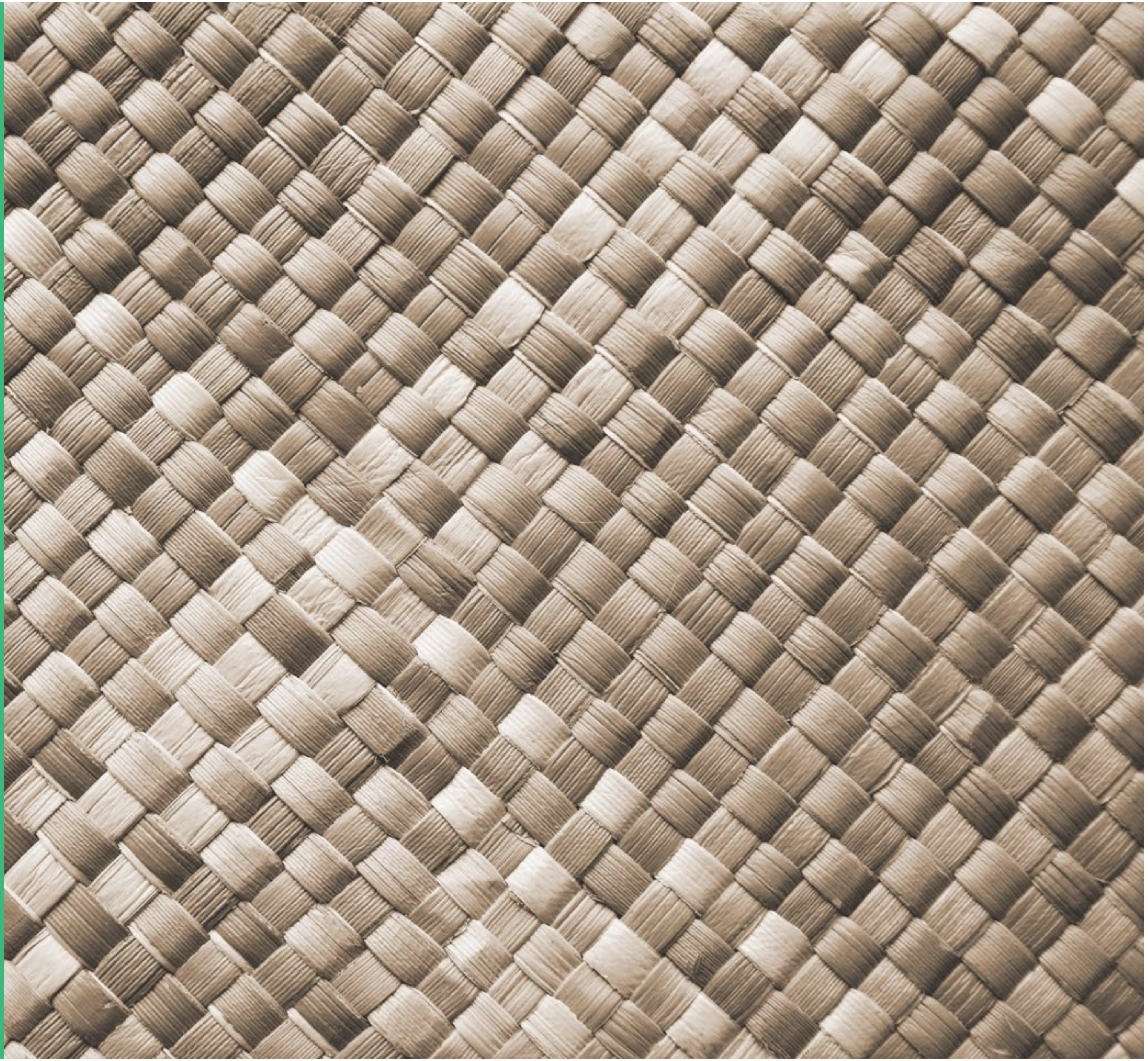
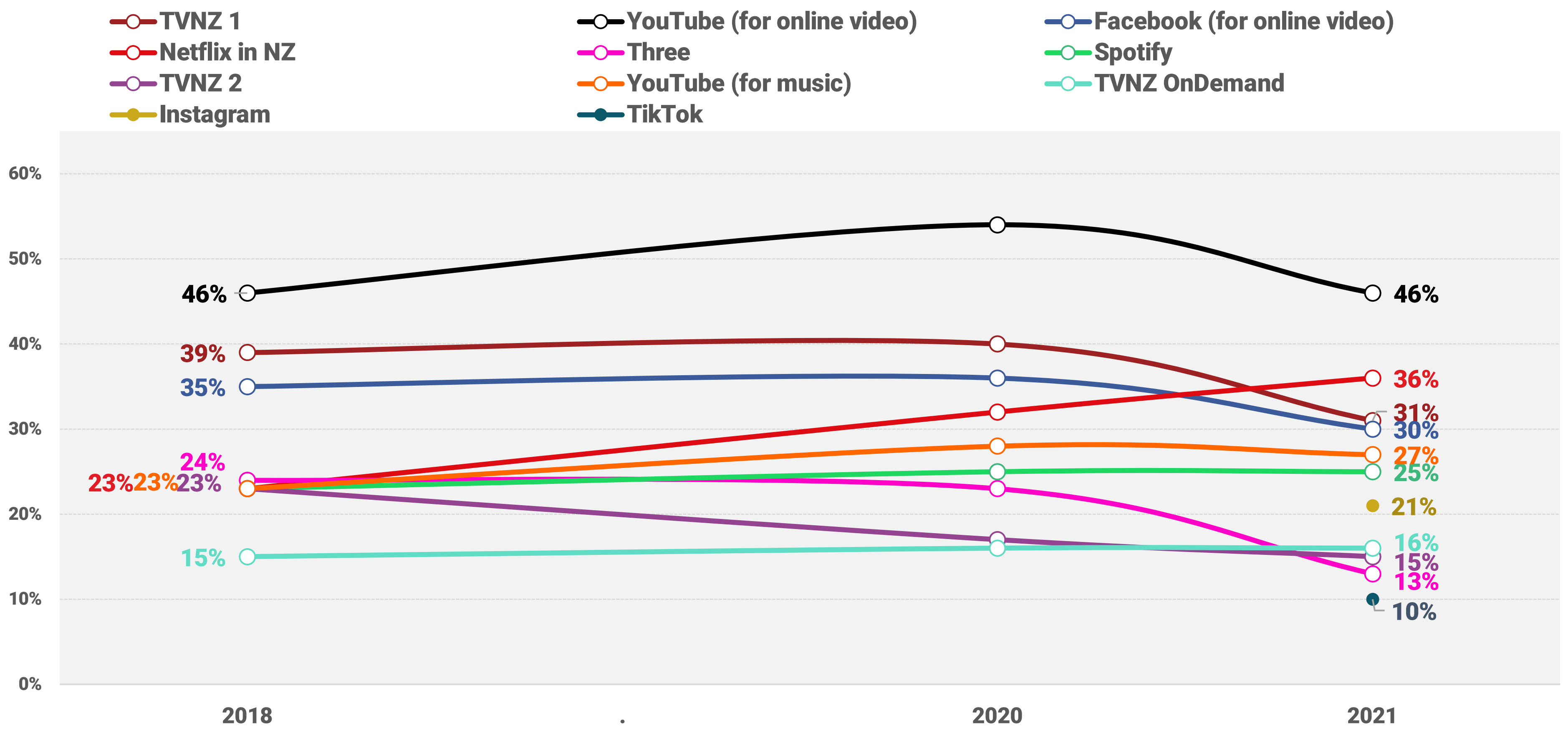
Daily Media Consumption By Channel, Site & Station



Netflix is the only main provider to show audience growth among lower socio-economic groups since 2020 and is now the second most popular provider. YouTube (for video), TVNZ 1, Facebook (for video) and Three all show significant declines with the remaining top providers stable.

Most popular channels, sites & stations 2021 – all lower socio 15+ (10% reach and above)

Q: Which of the following did you use yesterday?



Next tier:

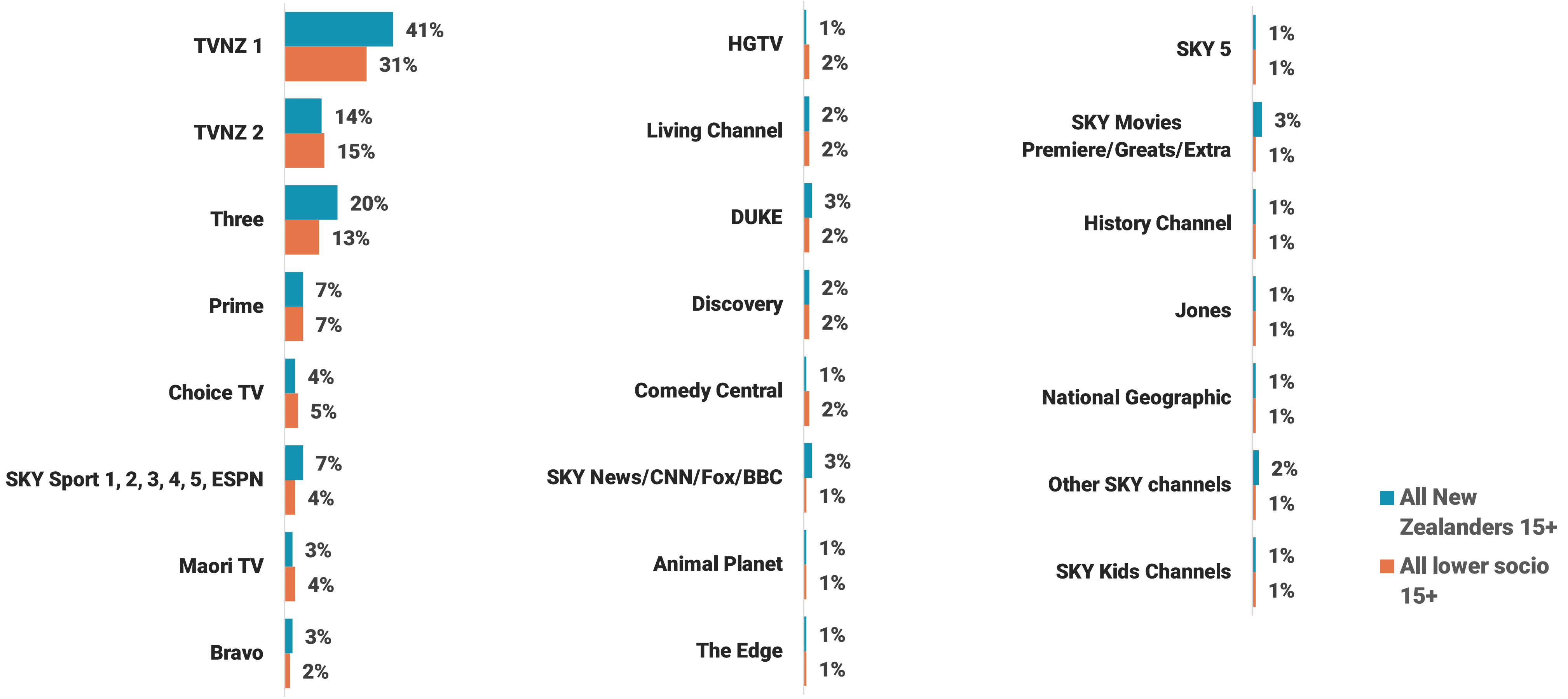
- **Stuff** (for video) 8%
- **Prime** 7%
- **NZ Herald** (for video) 7%
- **Disney Plus** 7%
- **Amazon Prime** 7%
- **3NOW** 7%
- **Mai FM** 7%
- **Snapchat** 7%

Base: All respondents: (2018 n=235; 2020 n=275; 2021 n=223)

Lower socio groups tend to watch TV in smaller numbers than overall New Zealanders 15+. Therefore it is not surprising this group tend to watch many TV channels less than average. TVNZ 1 attracts the biggest audience with three in ten tuning in each day, but this is significantly less than overall New Zealanders.

Daily reach of TV channels 2021 – all New Zealanders 15+ & all lower socio 15+ (1% reach and above).

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

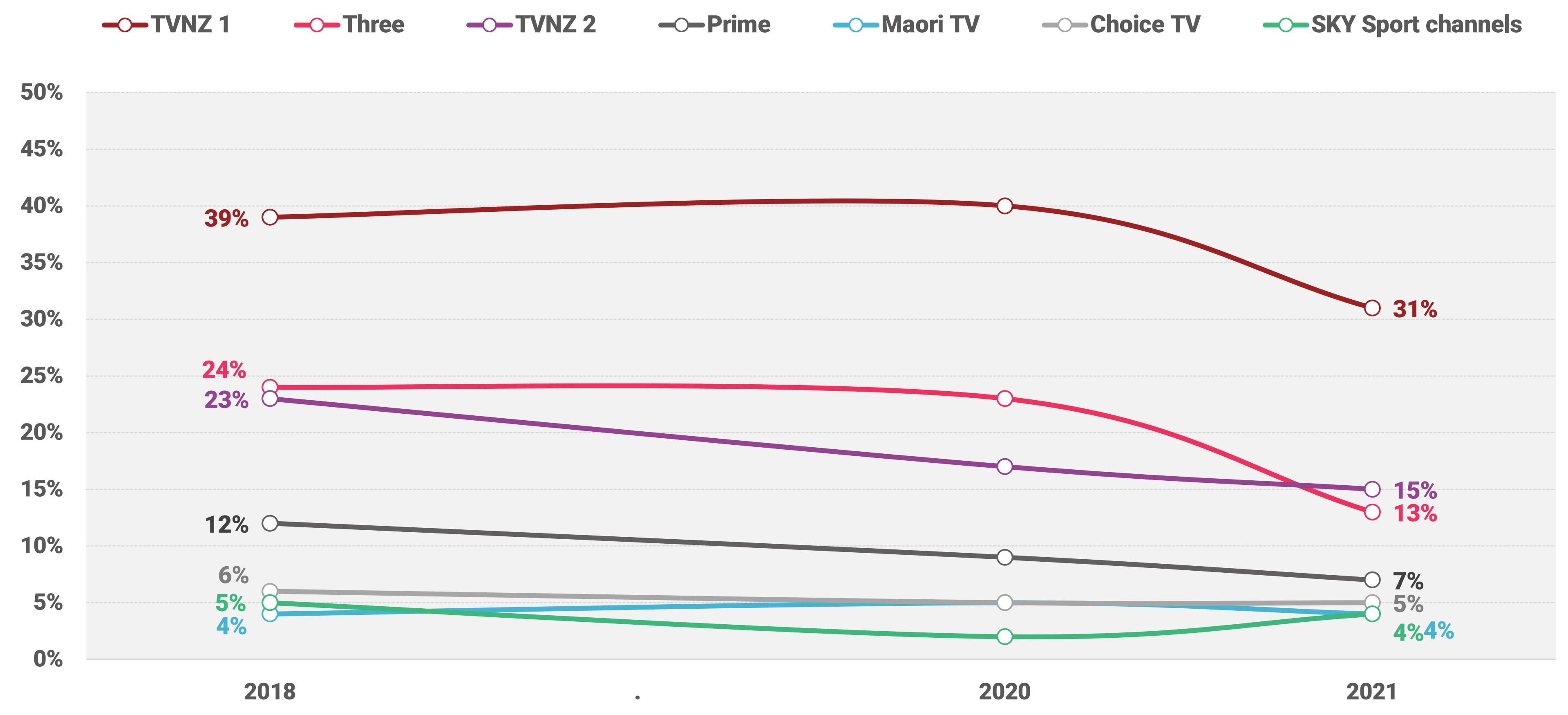


TVNZ 2 (15%) and Three (13% attract the second biggest daily audiences among lower socio-economic groups.

The audience watching TVNZ 1 has declined significantly since 2020 among lower socio-economic groups, as has the audience watching Three. SKY Sport is the only channel to show a slight increase in audience in 2021.

Daily reach of TV channels (4% reach and over) – all lower socio 15+.

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

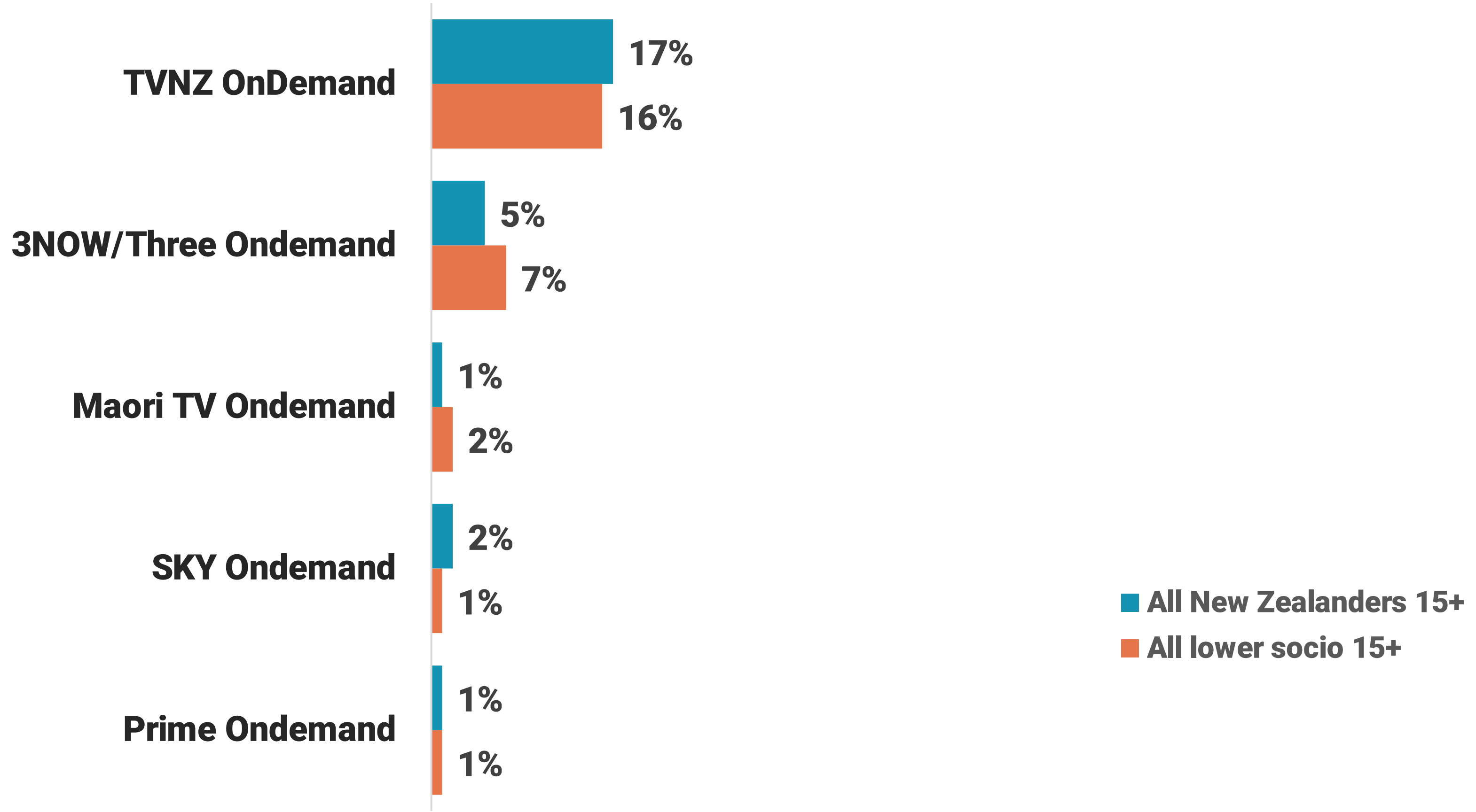


Base: All lower socio: (2018 n=235; 2020 n=275; 2021 n=223).

TVNZ OnDemand is the most popular on demand site among lower socio groups with 16% watching this site each day. 3NOW is watched by 7% of lower socio-economic groups each day.

Daily reach of on demand sites 2021 – All New Zealanders 15+ & all lower socio 15+.

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

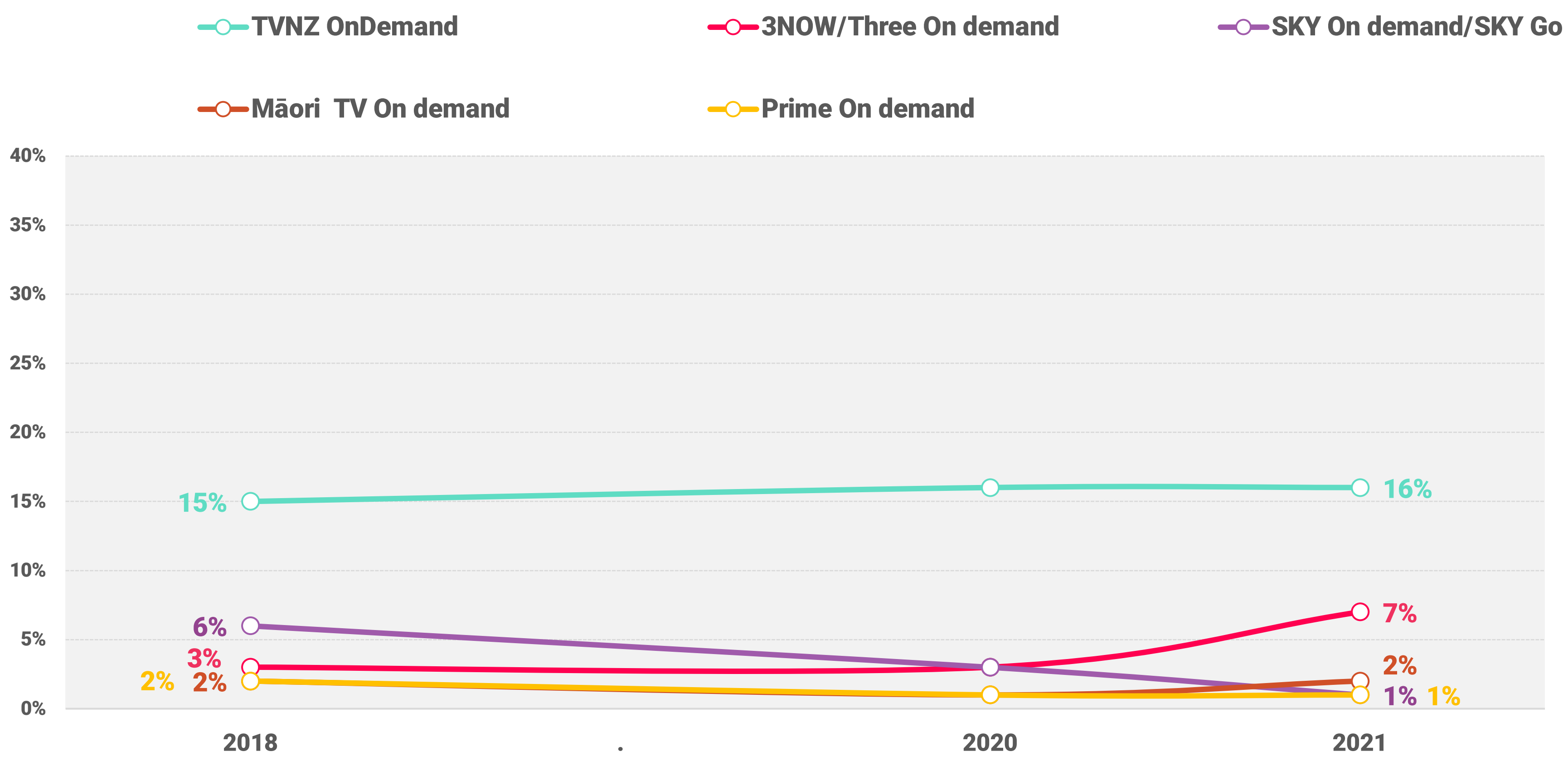


Base: All New Zealanders (n=1,420); all lower socio (n=223)

The daily audiences watching each on demand site are largely stable since 2020, except for an increase in the audience watching 3NOW among lower socio-economic groups.

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

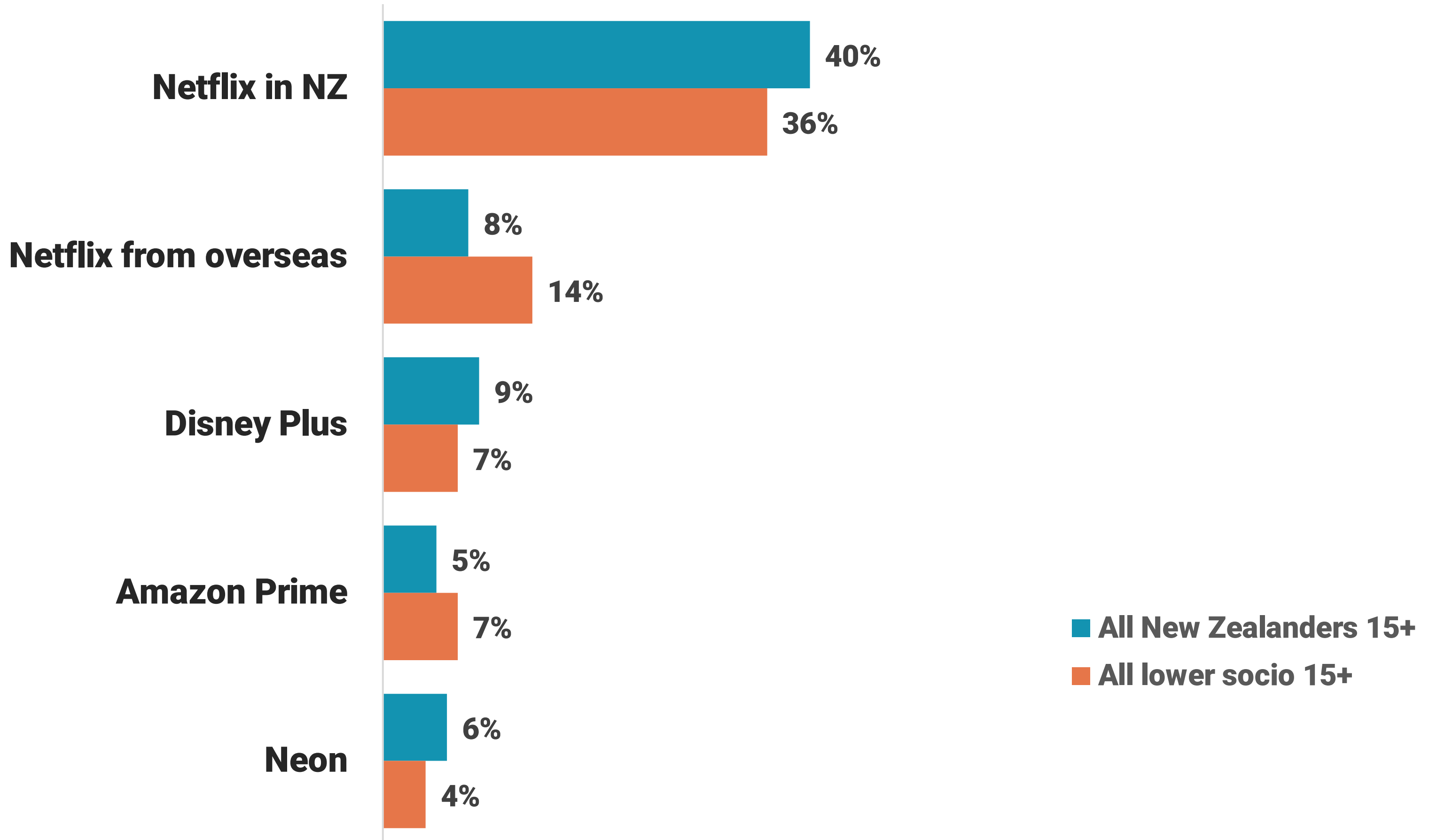
Q: Thinking about yesterday overall, which of the following websites did you watch?



The daily use of SVOD sites among lower socio groups is similar to overall New Zealanders 15+. Netflix is the most popular provider by a significant margin, with one in three lower socio audiences watching this provider each day, and 7% watching Disney Plus and/or Amazon Prime each day.

Daily reach of SVOD sites 2021 – All New Zealanders 15+ & all lower socio 15+.

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



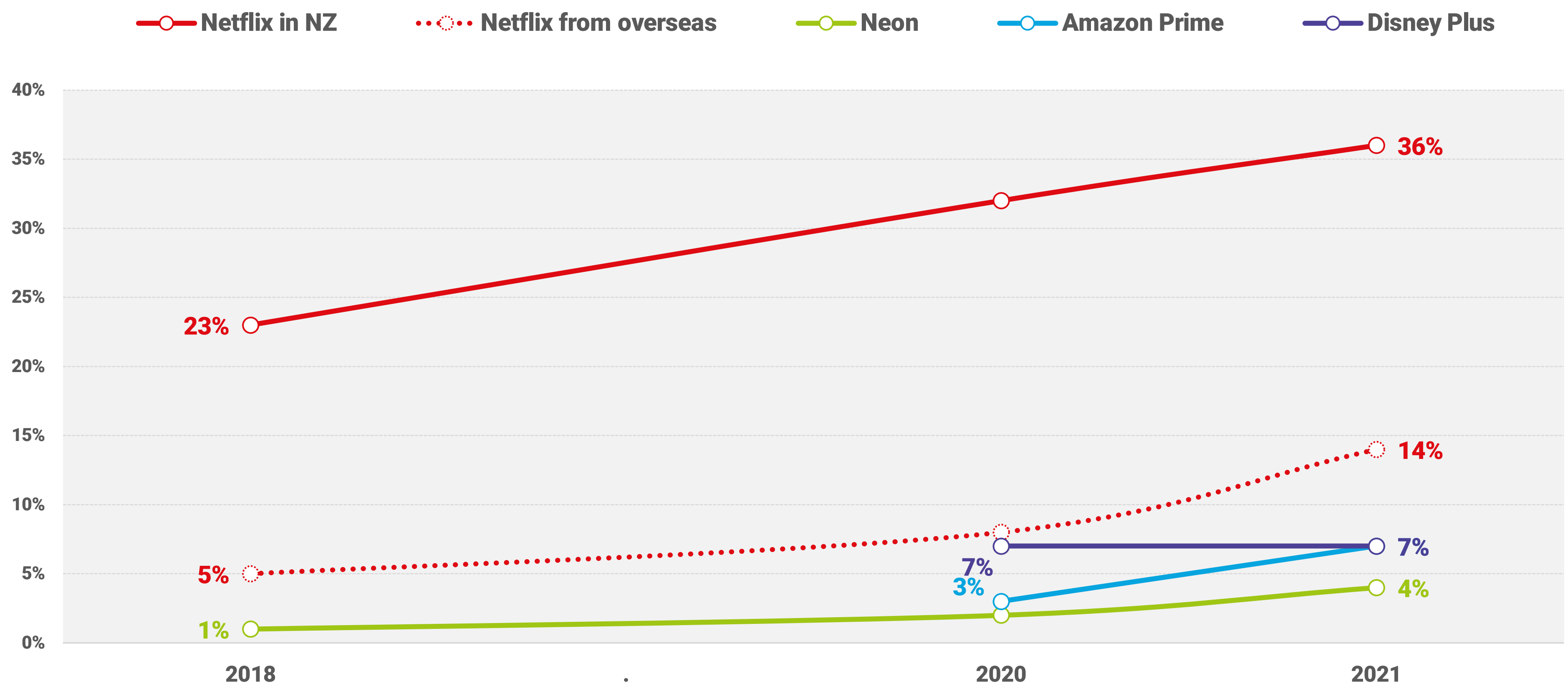
Note: Neon refers to the newly merged SVOD provider of Neon and Lightbox.

Base: All New Zealanders (n=1,420); all lower socio (n=223)

The daily audiences using most SVOD providers have increased slightly among lower socio-economic groups since 2020 - matching the overall increase in SVOD audiences among this group.

Daily reach of SVOD sites – all lower socio 15+

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



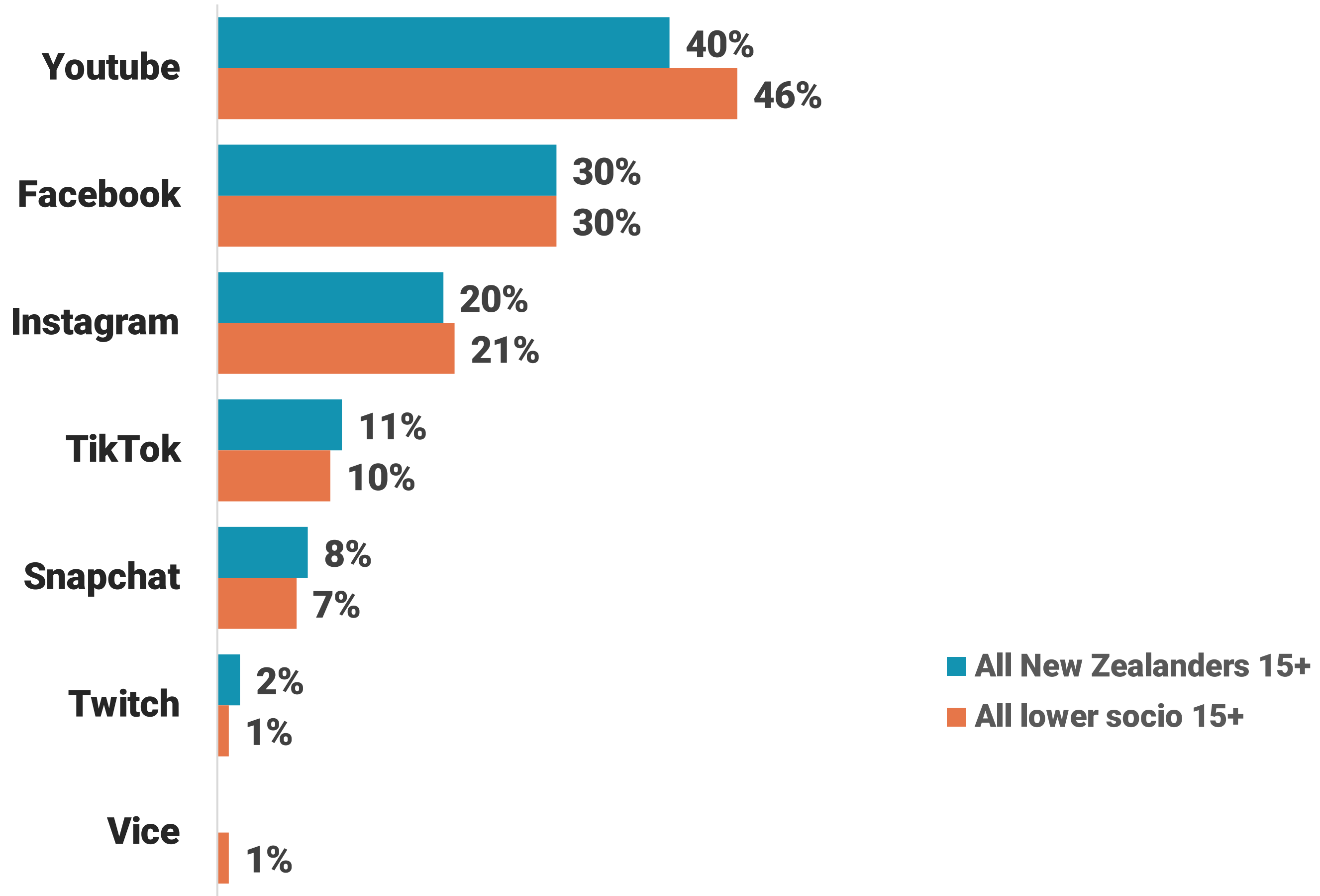
Note: Neon refers to the newly merged SVOD provider of Neon and Lightbox.

Base: All lower socio: (2018 n=235; 2020 n=275; 2021 n=223).

YouTube and Facebook (for video) reach the biggest audiences among lower socio-economic groups each day. Lower socio audiences are more likely than all New Zealanders 15+ to use YouTube for video, but otherwise the sites this group use each day to watch online video do not differ significantly from overall New Zealanders 15+.

Daily reach of overseas online video sites 2021 – All New Zealanders 15+ & all lower socio 15+.

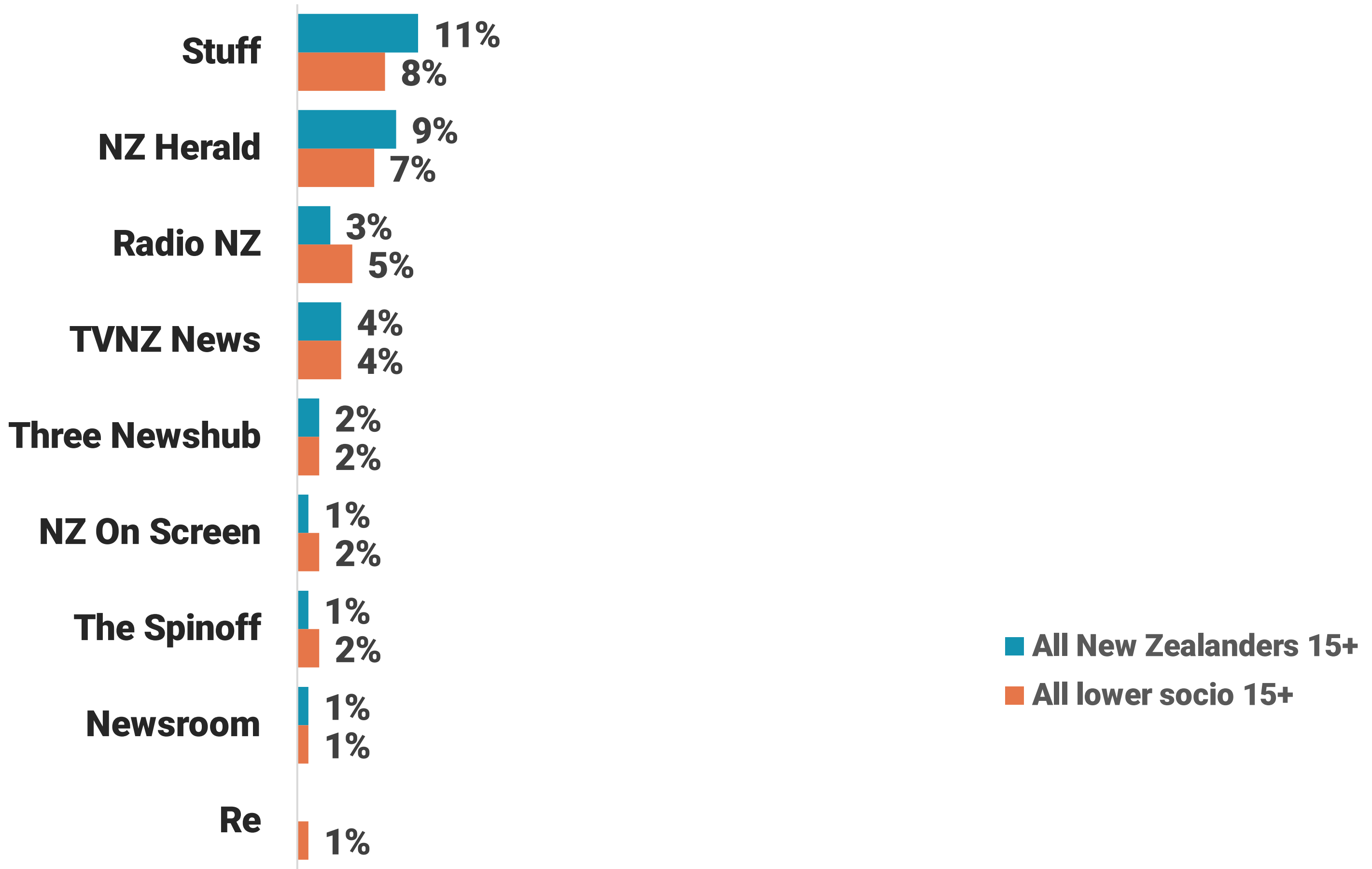
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Stuff and NZ Herald each attract the biggest audiences each day to NZ online video among lower socio-economic groups. There is no significant difference between the audience behaviour of this group and overall New Zealanders 15+.

Daily reach of NZ online video sites 2021 – All New Zealanders 15+ & all lower socio 15+.

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

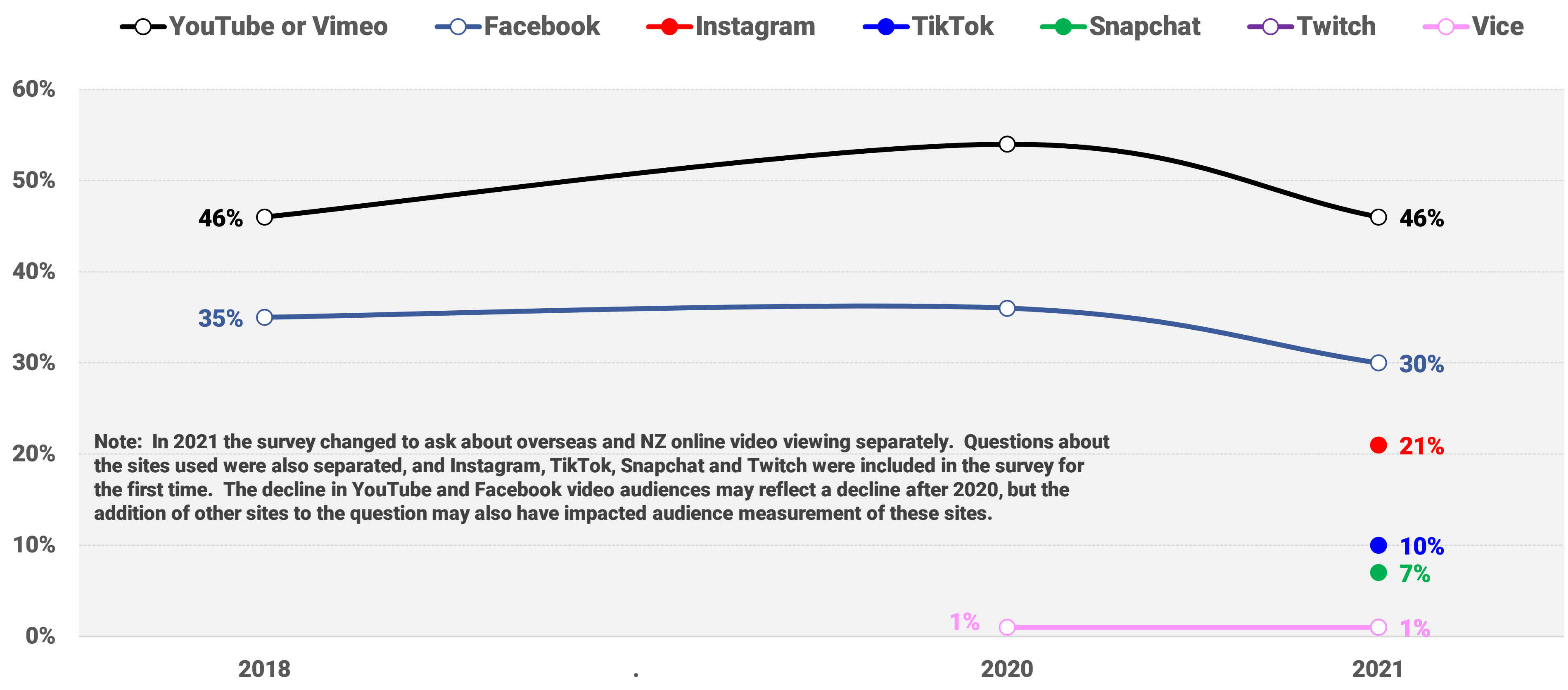


Base: All New Zealanders (n=1,420); all lower socio (n=223)

YouTube and Facebook (for video) show slight declines in audience size in 2021 but still reach the biggest audiences among lower socio-economic groups. Instagram reaches one in five of this group each day.

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

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



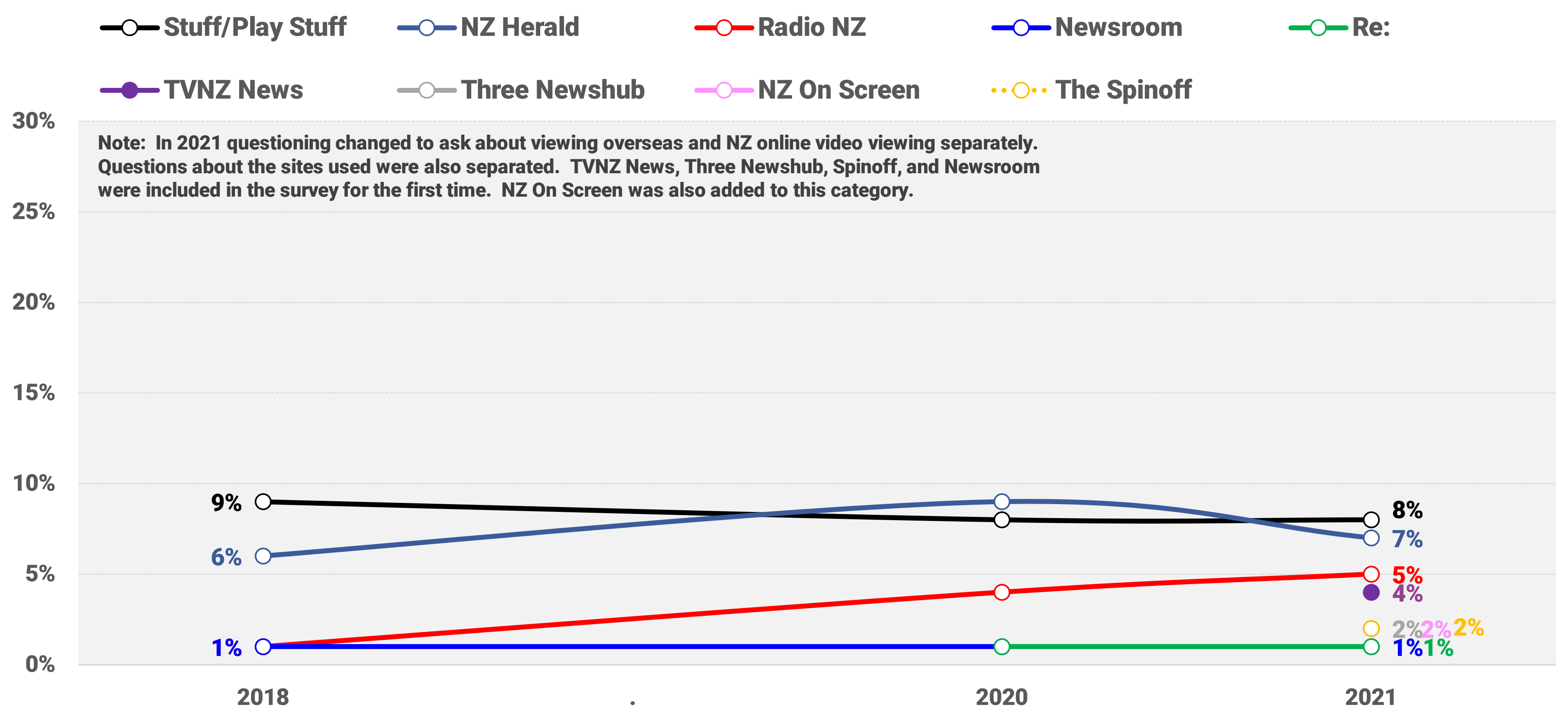
Note: In 2021 the survey changed to ask about overseas and NZ online video viewing separately. Questions about the sites used were also separated, and Instagram, TikTok, Snapchat and Twitch were included in the survey for the first time. The decline in YouTube and Facebook video audiences may reflect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

Base: All lower socio: (2018 n=235; 2020 n=275; 2021 n=223).

Stuff and NZ Herald show stable daily audiences among lower socio-economic groups since 2020, while Radio NZ has increased its daily reach slightly. Several providers reach 1-2% of this group each day.

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

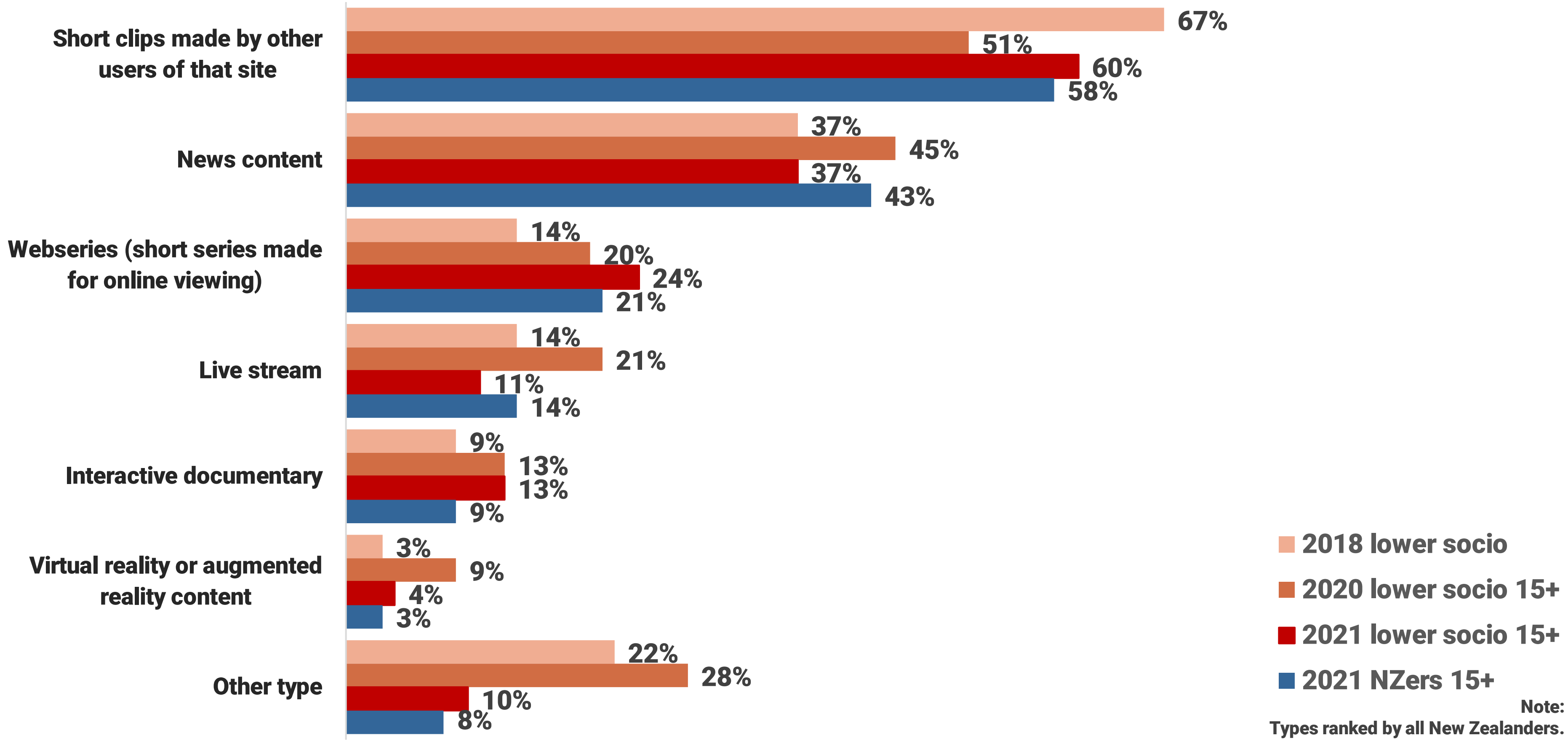
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



Short user generated clips remain the most popular type of online video among lower socio groups with six in ten watching this type of online video each day. Audiences watching this type of online video have increased, while news content audiences have declined since 2020.

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

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



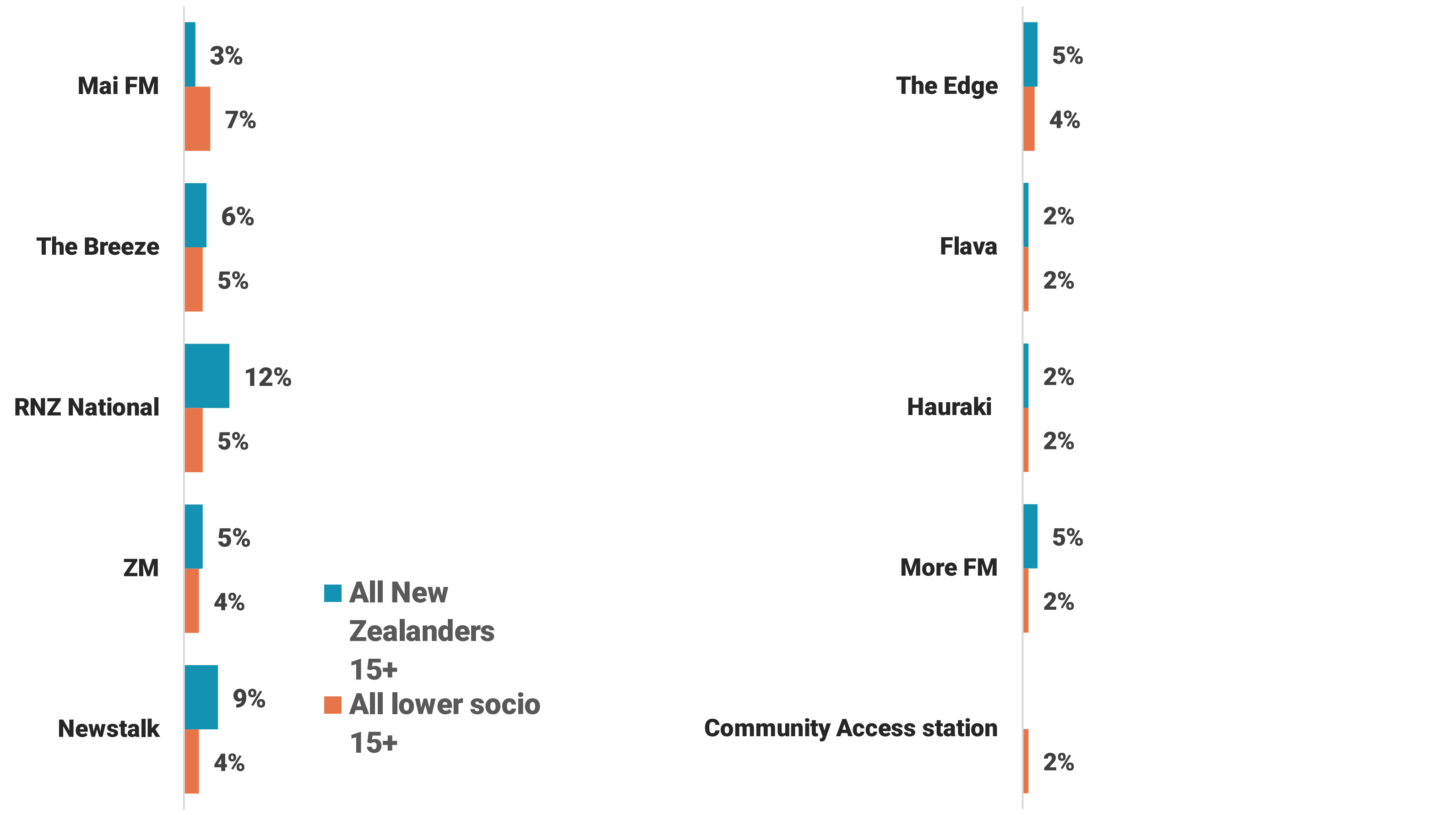
Note:
Types ranked by all New Zealanders.

Base: All who watch online video: (2021 n=844); All lower socio who watched online video (2018 n=131; 2020 n=170; 2021 n=144)

Mai FM attracts the biggest audience each day among lower socio-economic groups – 7% listen each day. This is followed by The Breeze and RNZ National.

Daily reach of radio stations 2021 – all New Zealanders 15+ and all lower socio 15+ (2% reach and under).

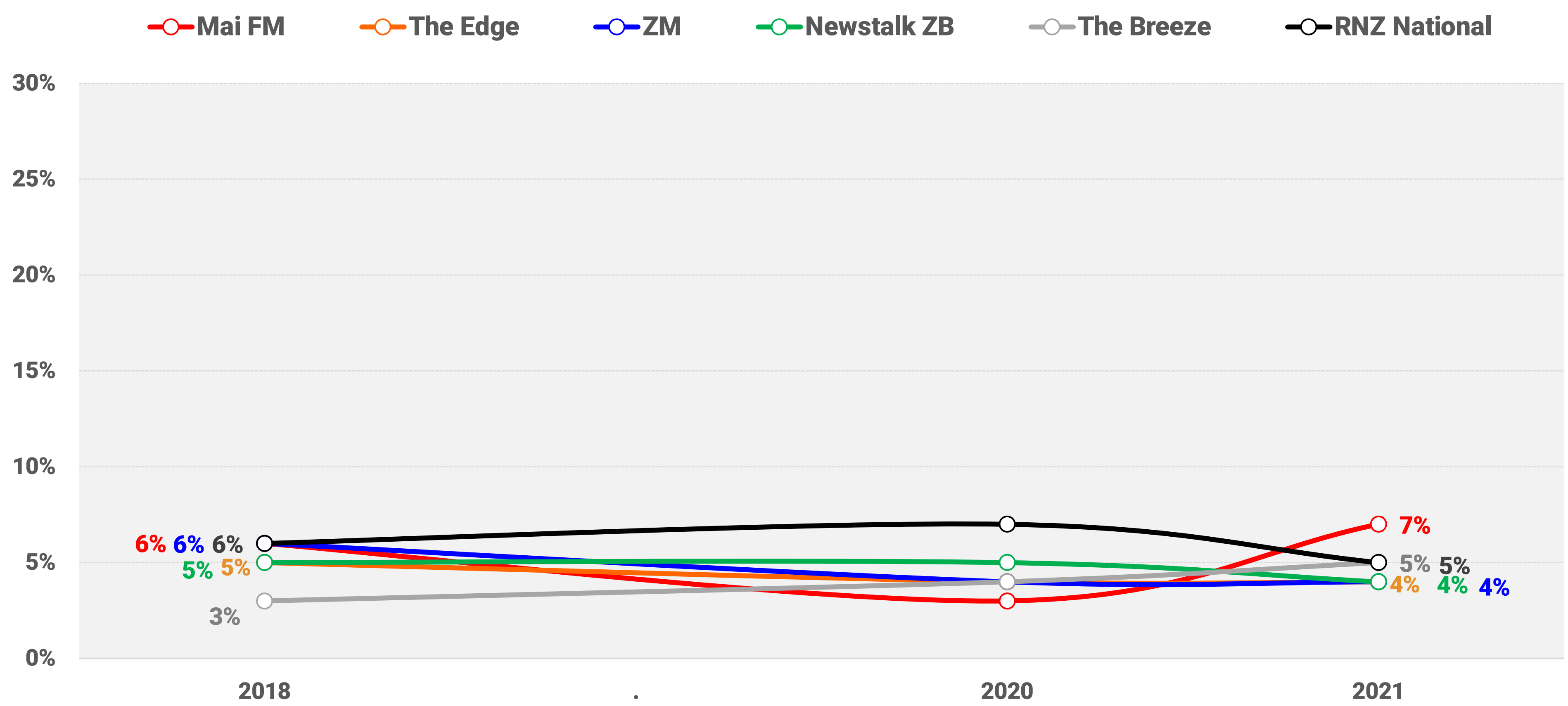
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



The Mai FM audience has increased significantly among lower socio-economic groups in 2021, while the remainder of the most popular stations are stable since 2020.

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

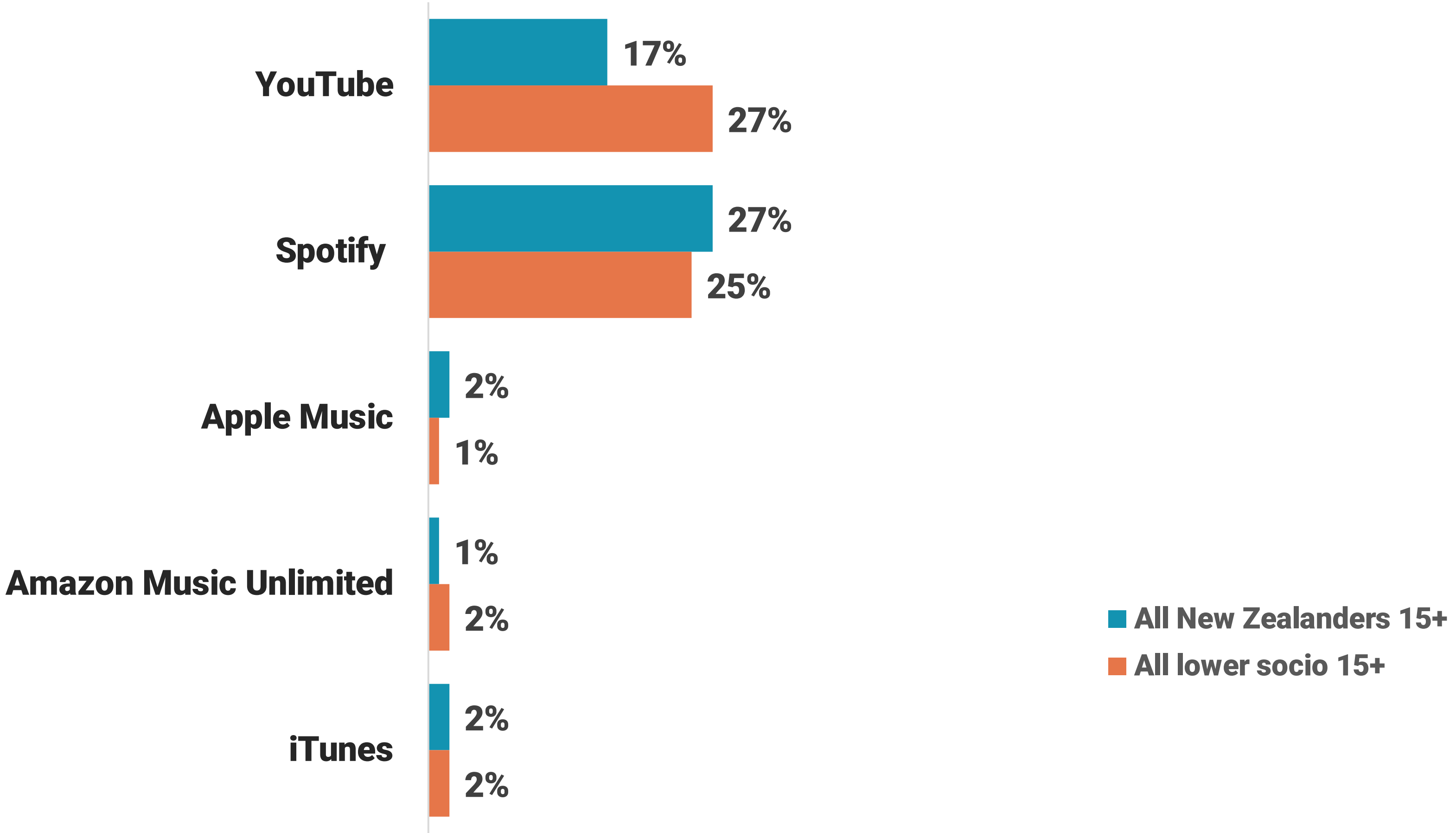
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



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

Daily reach of music streaming sites 2021 – All New Zealanders 15+ & all lower socio 15+.

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

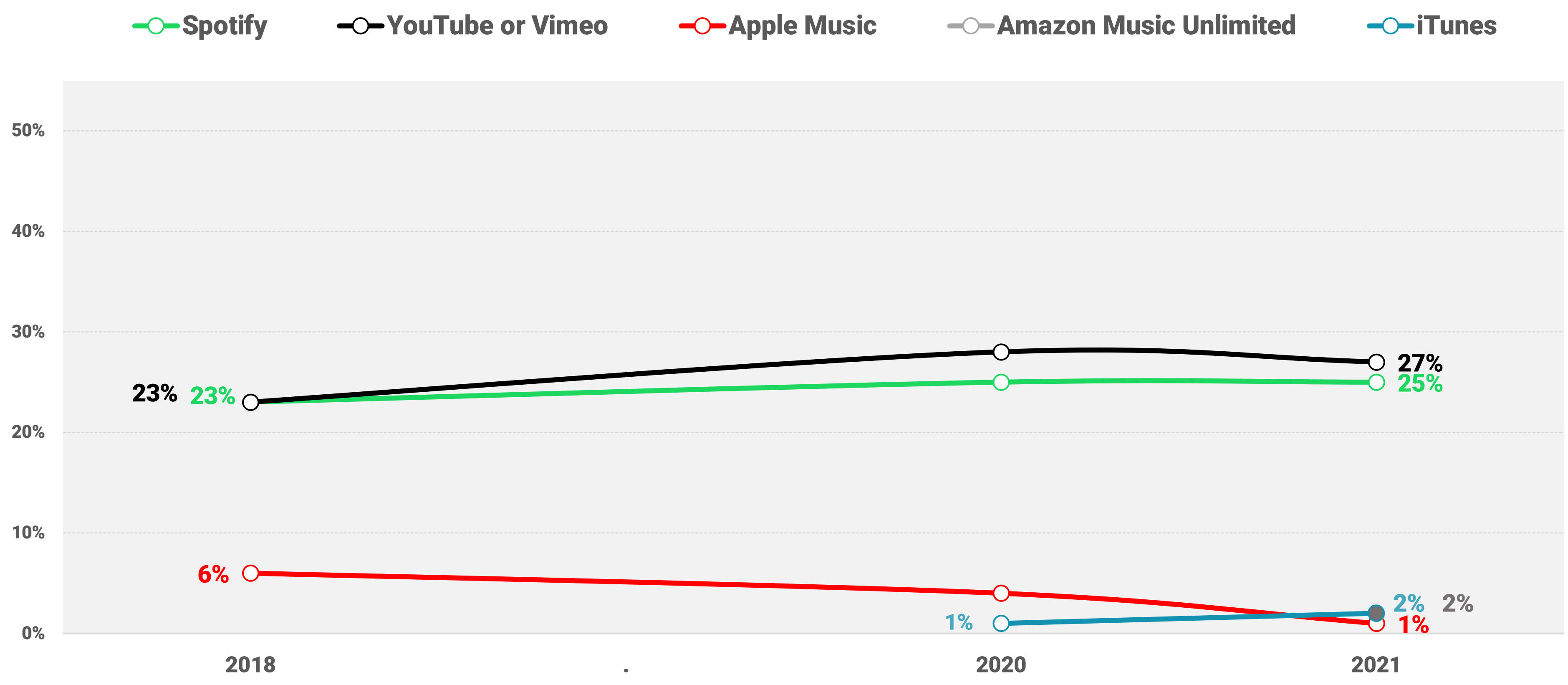


Base: All New Zealanders (n=1,420); all lower socio (n=223)

There has been no significant change in the audiences using the main two music streaming sites, however the lower socio audience listening to Apple Music has declined.

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

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

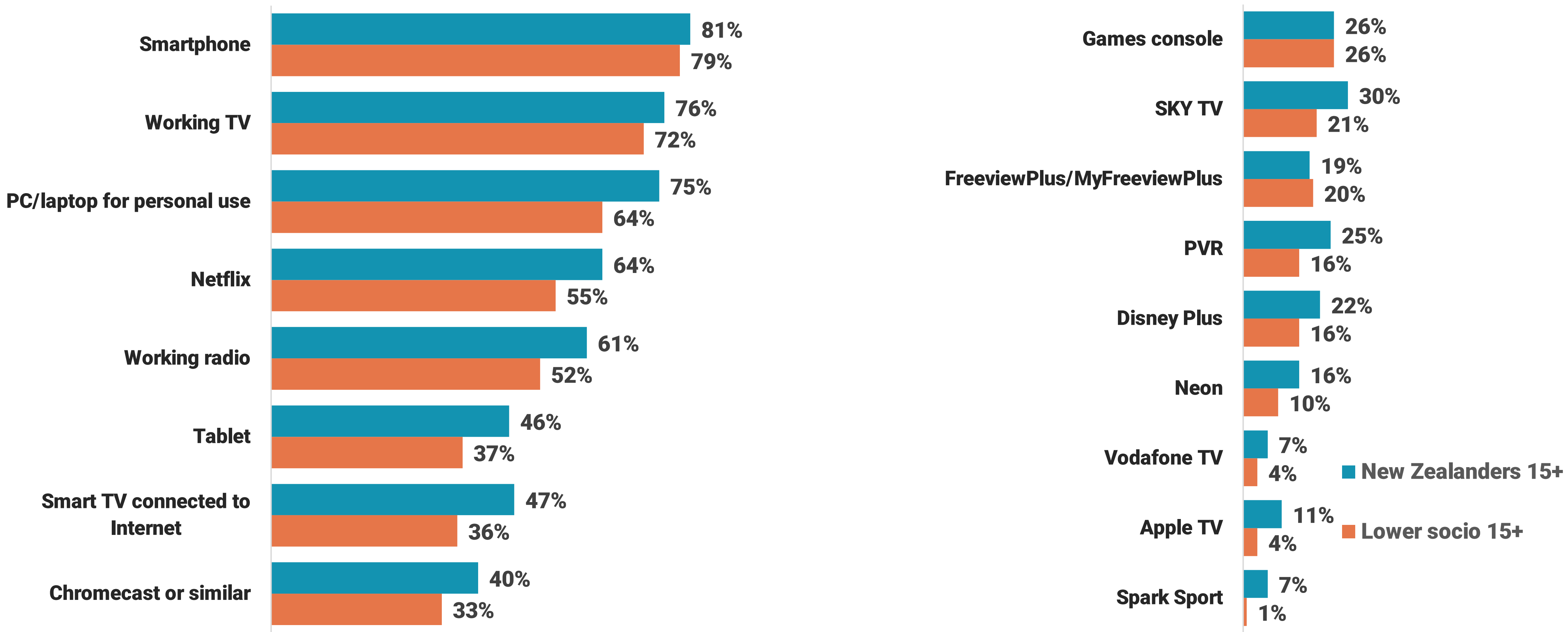


Devices Personally Own Or Have Daily Access To

With the exception of a games console and MyFreeview, lower socio groups are less likely to have access to nearly all the devices and platforms that enable media use. Some of these differences are not statistically significant but the difference is consistent throughout. In particular significantly fewer lower socio groups have access to SKY TV than overall New Zealanders 15+.

Devices & platforms personally own or have daily access to 2021 – all New Zealanders 15+ & all lower socio 15+.

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

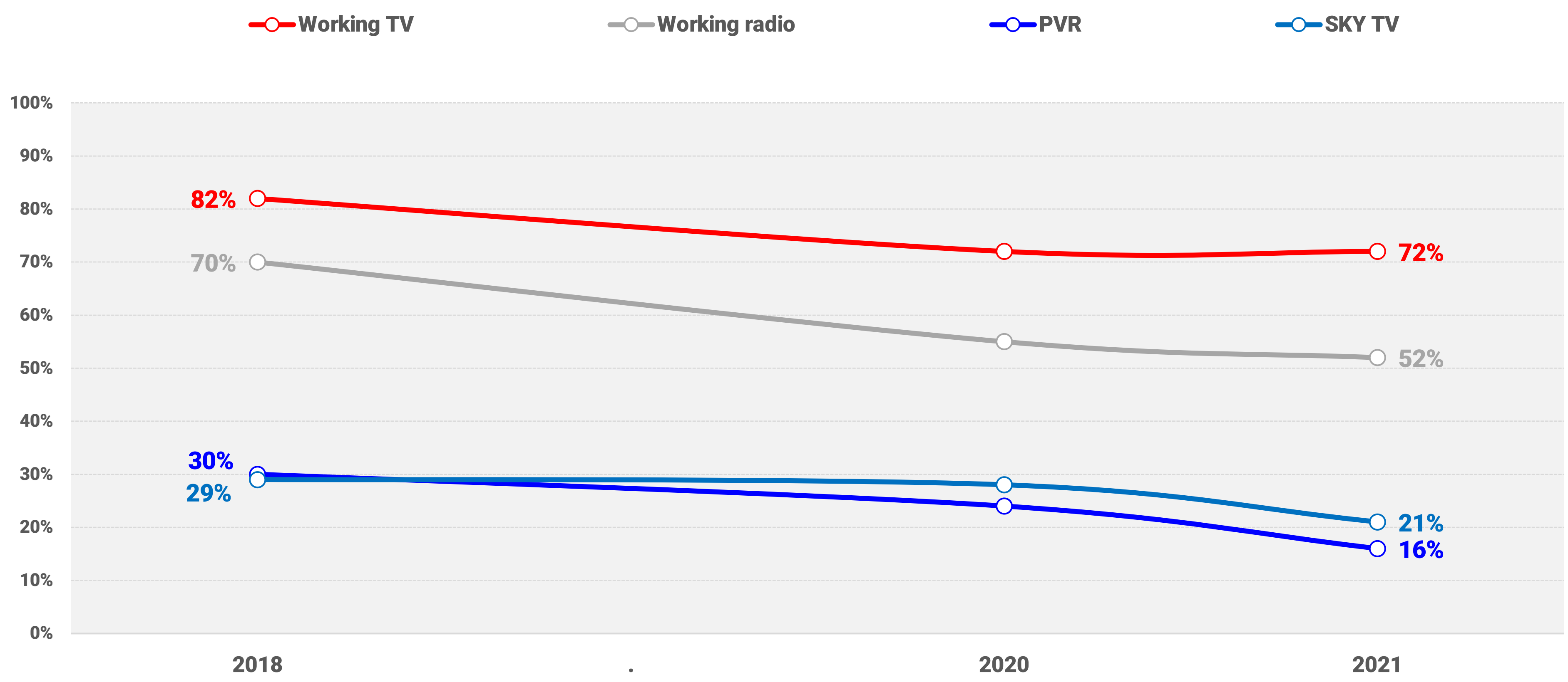


Base: All New Zealanders 15+: (2021 n=1,420); all lower socio (2020 n=223).

While the incidence of access to a working TV or radio has not changed since 2020, access to a PVR and SKY TV has declined significantly, reflecting the overall decline in TV viewing via a pay TV platform.

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

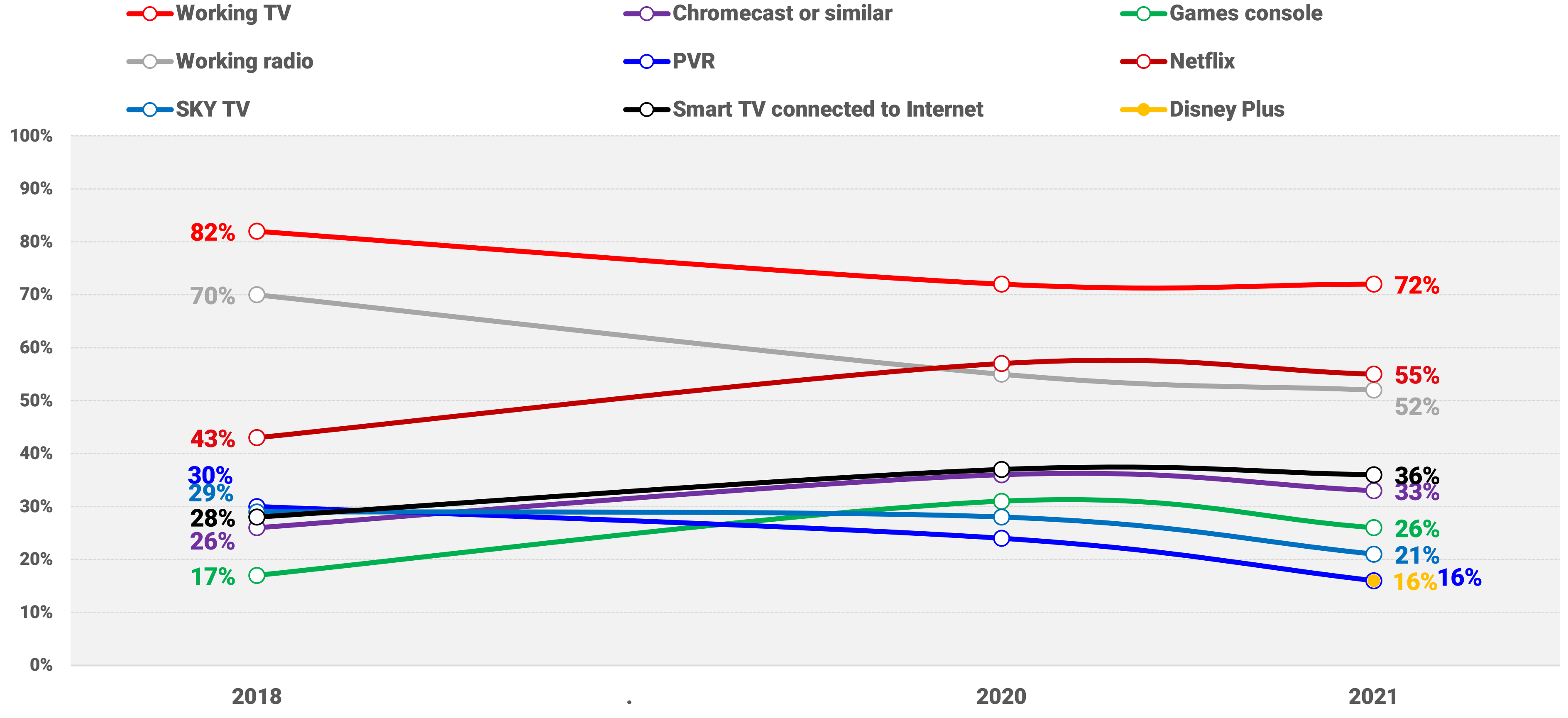
Q: Which of the following, if any, do you personally own or have daily access to?



Other than a small increase in access to a gaming console among lower socio-economic groups, access to the most common devices and platforms that enable access to digital media is unchanged since 2020.

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

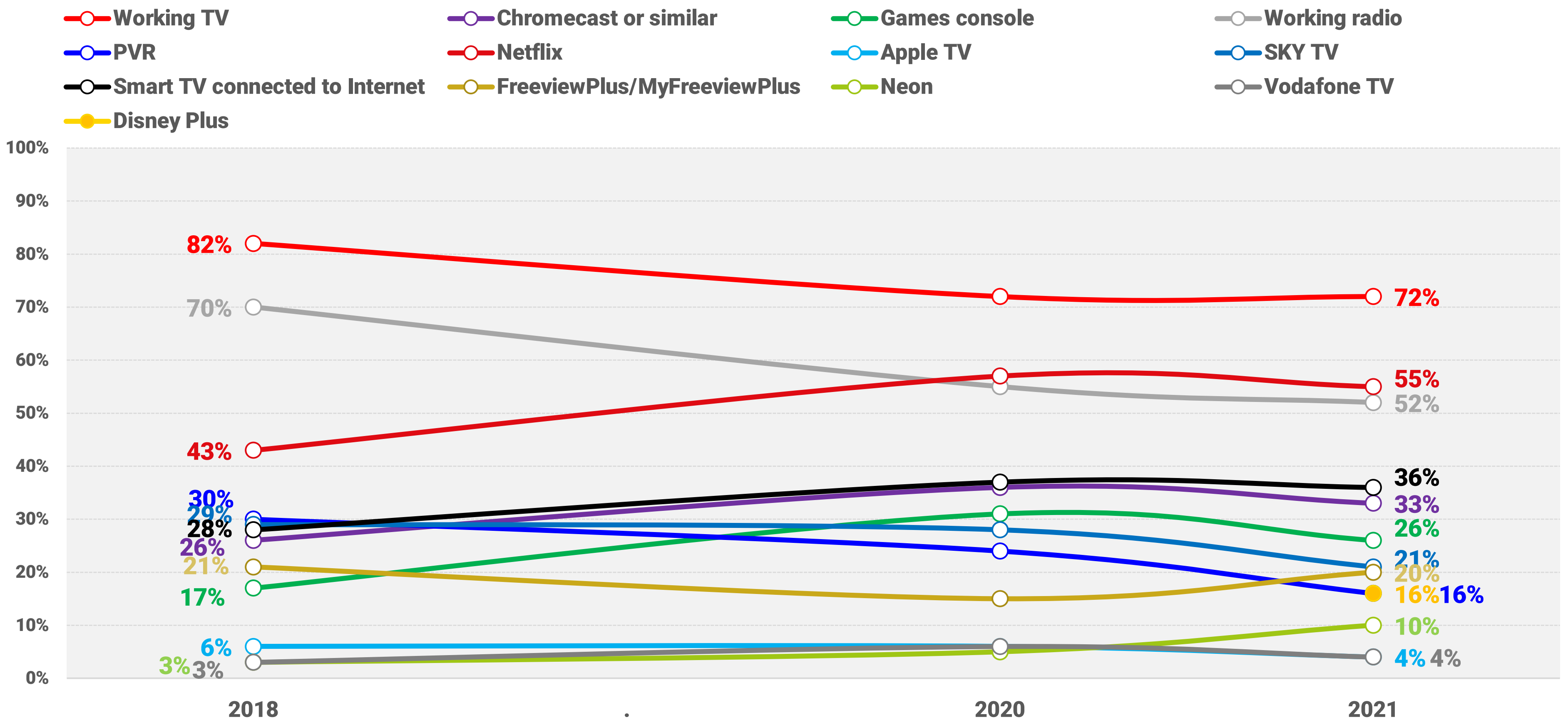
Q: Which of the following, if any, do you personally own or have daily access to?



While the incidence of PVRs has declined overall, incidence of MyFreeview has recovered from the decline seen in 2020, indicating that the PVR decline is driven by the decline of SKY TV overall. The newly merged Neon has also increased significantly in incidence.

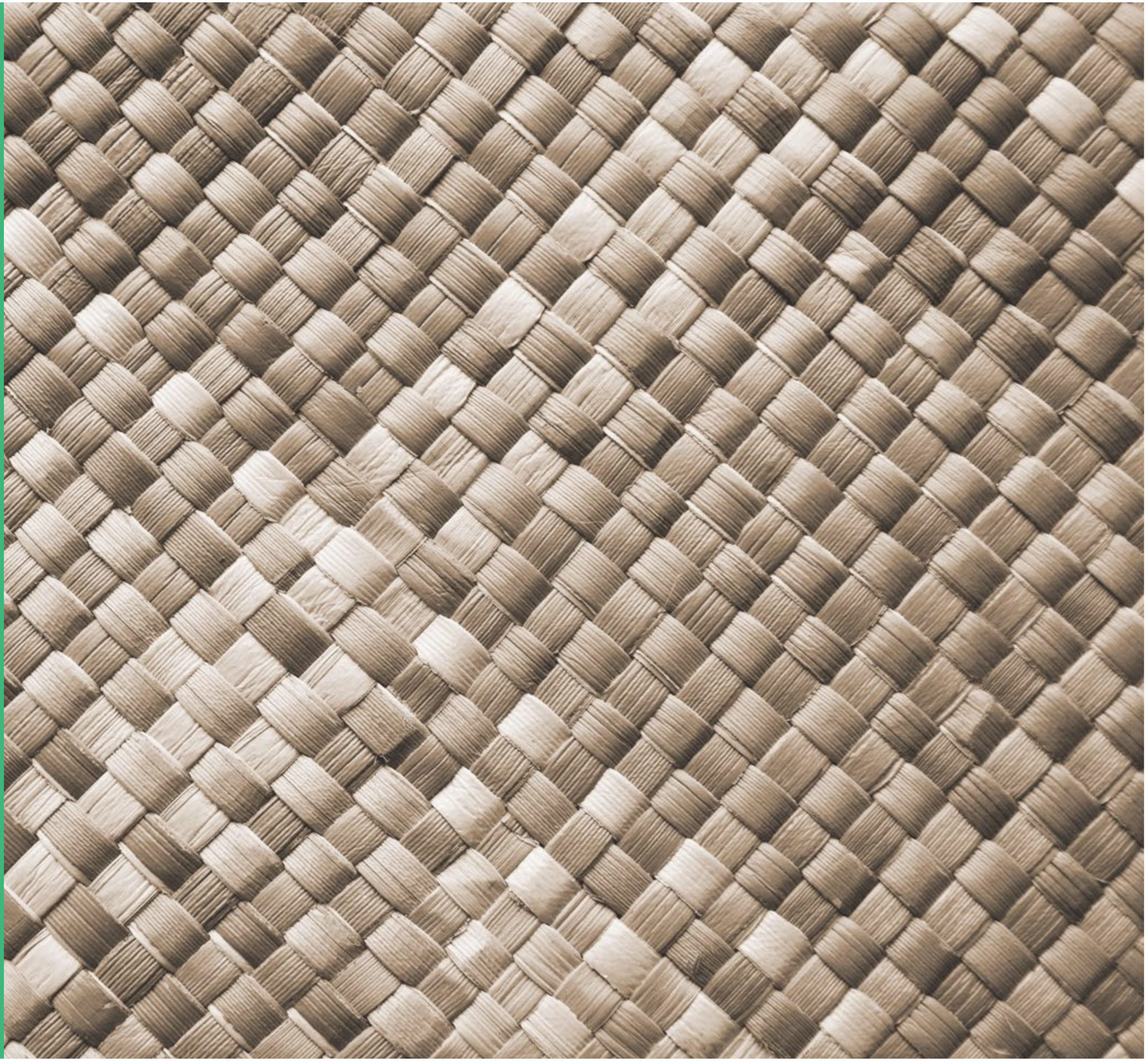
Devices & platforms personally own or have daily access to – all lower socio 15+.

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



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

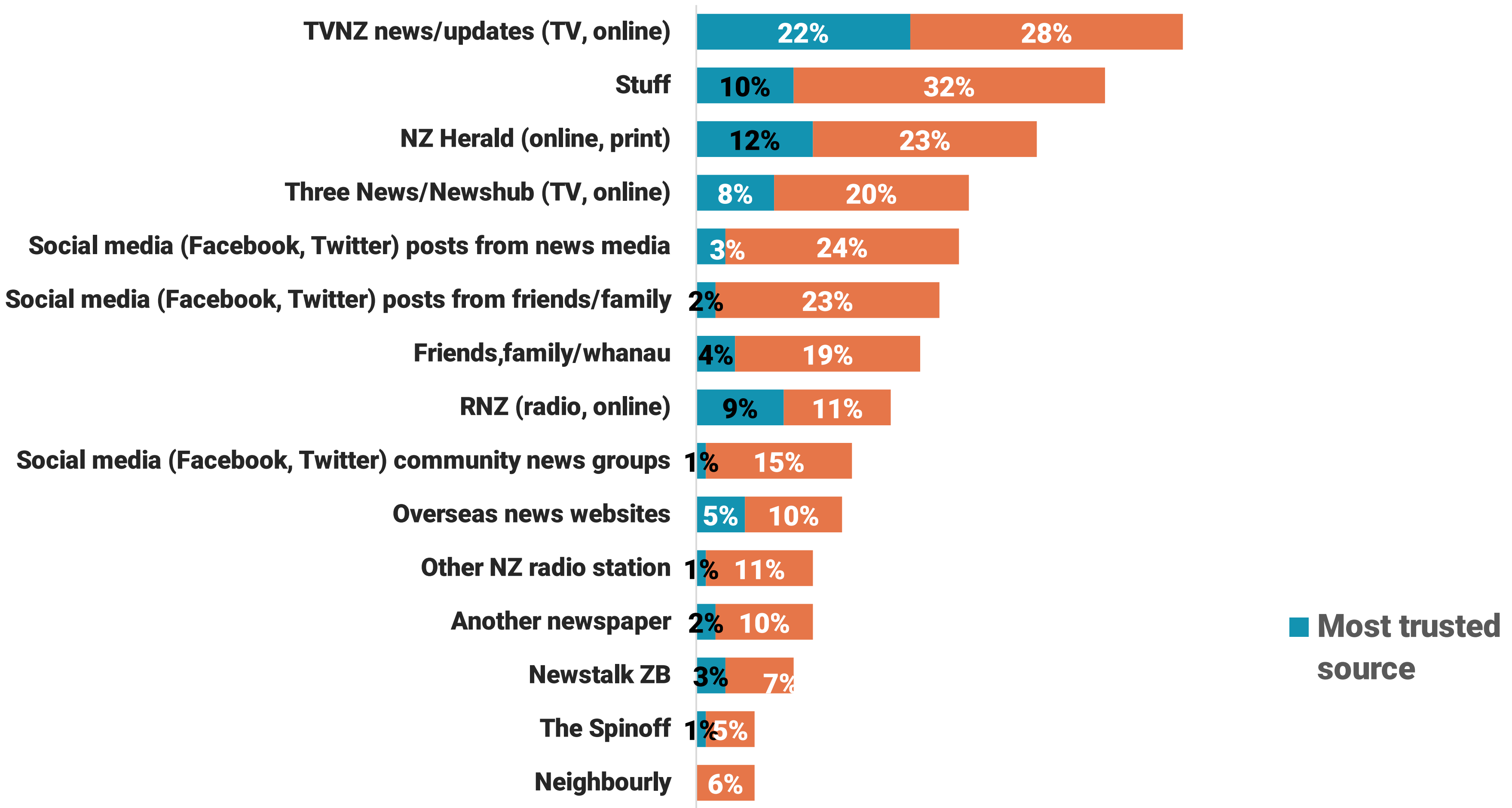
Sources of news



TVNZ News is the most widely used and trusted source of news among lower socio-economic groups. Stuff is second most widely used over NZ Herald and Three Newshub but incidence of these sources being the most trusted is relatively equal. Social media and word of mouth are widely used but less widely trusted.

Sources of news and information (sources used by 5% or more) – all lower socio 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?**



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WHERE ARE THE AUDIENCES?

Lower socio-economic report

AUGUST 2021