



# WHERE ARE THE **AUDIENCES?**

**Youth (15-24s) report**

**AUGUST 2021**

- **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:**
  - Youth (15-24 year olds)
  - Māori
  - Pacific Island peoples
  - Lower socio-economic groups
- **This report summarises the results from NZ On Air’s 2021 “Where Are The Audiences?” study based on Youth.**
  - It compares the 2021 results to all previous studies among 15-24s, 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 among 15-24s and to trends over time shows that levels 1 and 2 conditions had only a minor impact on this audience's behaviour in 2020, and mainly impacted some digital media.**
- **For some digital media the impact is reflected in slightly boosted audience sizes that have now declined slightly (eg. music streaming and online gaming). However SVOD and online video do not exhibit the same trend.**
- **A slightly bigger impact is seen in the boost and subsequent decline in time spent viewing SVOD and listening to streamed music in 2021, suggesting these media received a lift in engagement in 2020 which has now declined slightly. Again online video was not affected by this trend.**
- **Overall however the specific impact of Levels 1 and 2 on 2020 audience behaviour was relatively minor and the results of the 2020 study are not strongly anomalous in the context of ongoing trends over time.**

- **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=251 New Zealanders aged 15-24 on which this report is based.**
- **The total sample has a maximum margin for error of +/-2.6%, and the sample of youth has a maximum margin for error of +/-6.2%.**

- **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.**

- **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

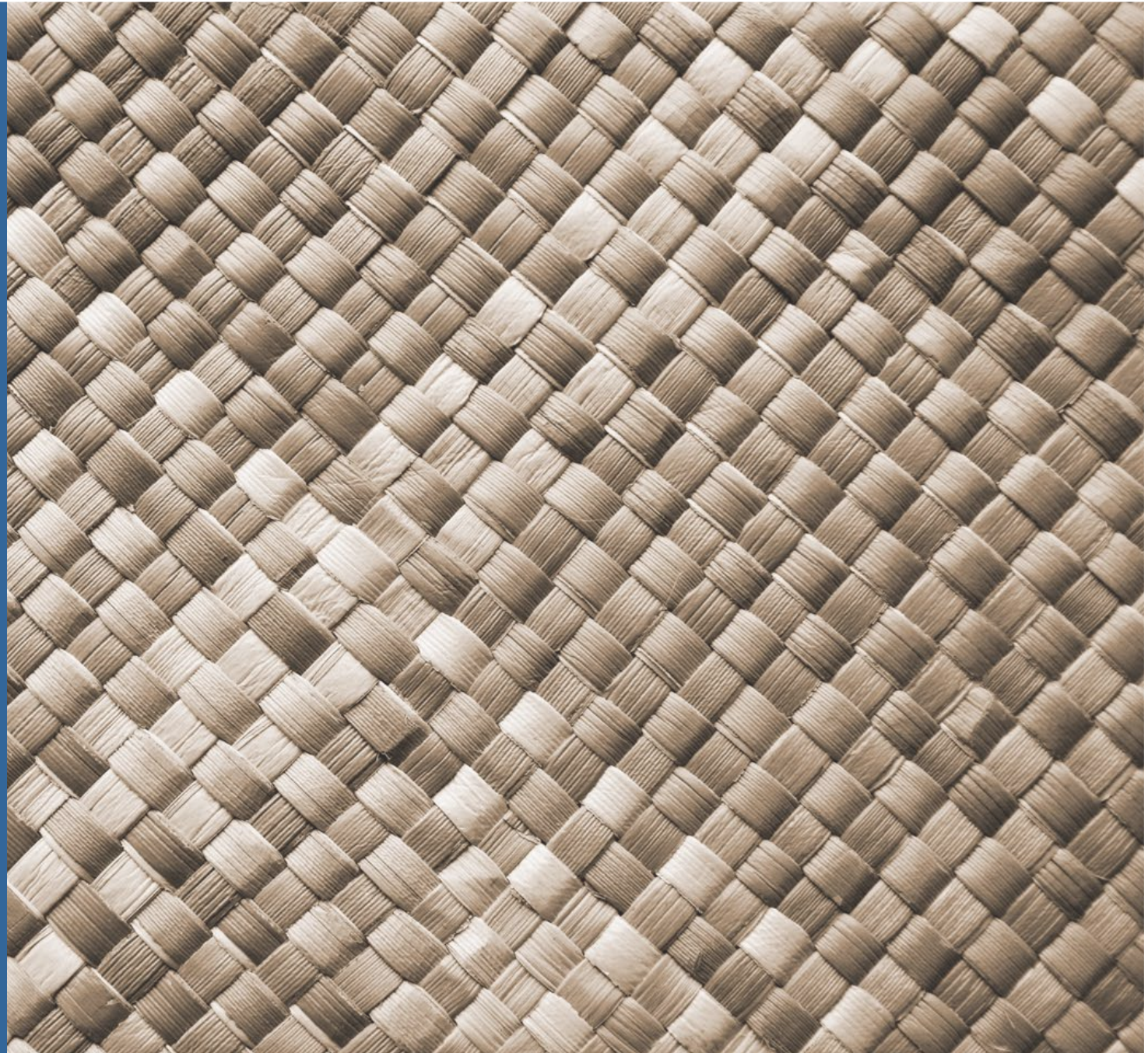
Abbreviation	Media Type
TV Total	Total (net) Linear TV
Radio	Live NZ Radio
OS Online Video (new 2021)	Online Video e.g. YouTube, Facebook
NZ Online Video (new 2021)	Online Video e.g. NZ Herald, Stuff
SVOD Total	Total (net) SVOD
NZ SVOD	NZSVOD (e.g. Netflix, Lightbox)
OS SVOD	Overseas SVOD (e.g. Netflix, 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





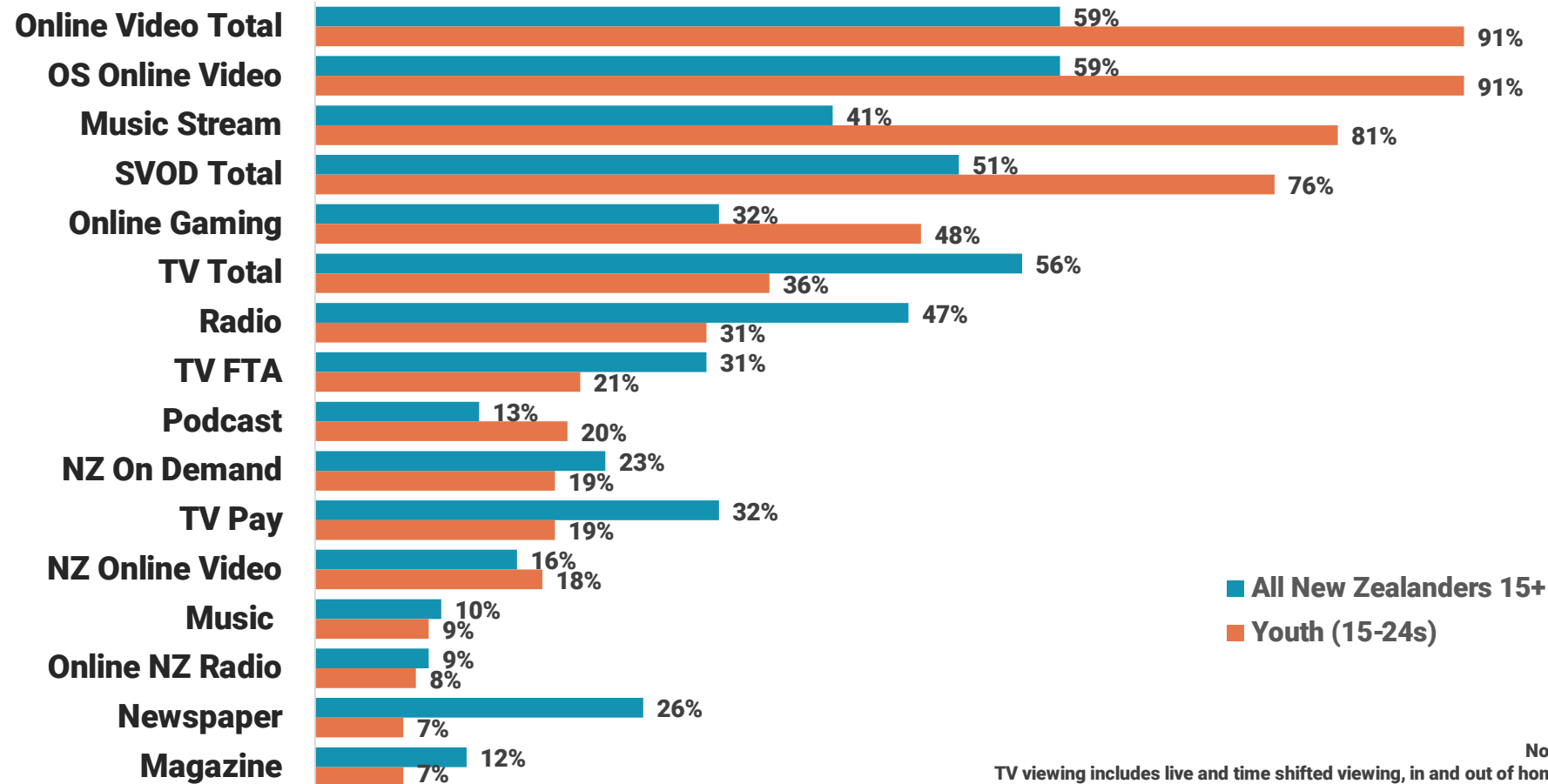
- **Digital media has been attracting bigger audiences than traditional media since at least 2016 among 15-24s, and this gap continues to widen.**
- **The digital media that reach the most 15-24s each day are online video (91%) (dominated by overseas online video), music streaming (81%), SVOD (76%) and online gaming (48%). While SVOD is the only one of these media to grow its audience in the last 12 months, there is a large gap between these digital media and the traditional media that reach the most 15-24s each day – TV (36%) and radio (31%).**
- **Unlike other audiences, there are no zones during the day when traditional media attracts a bigger audience than digital media.**
- **In addition, despite declines in time spent using all digital media except online video, 15-24s continue to dedicate significantly more time to using digital media than they do to using traditional media. Time spent using traditional media continues to decline at a steady rate.**
- **Therefore it is not surprising that the most popular providers among this audience are also digital – by a significant margin. YouTube, Facebook (for video), Netflix, Spotify and Instagram (for video) each reach more than four in ten 15-24 year olds each day. TVNZ 1 is the most popular traditional media provider but this channel reaches just one in five of this audience each day.**

- **Not surprisingly 15-24 year olds are significantly more likely to be able to access the devices and platforms that enable the use of digital media than overall New Zealanders 15+, and especially Netflix, a gaming console and Chromecast or similar.**
- **Social media, whether from friends and family, news media, or community groups is the most widely used source of news among 15-24s but fewer trust these sources most of all. Stuff and NZ Herald are equally widely used as social media and, along with TVNZ News, are the most trusted sources of news among 15-24s.**

**Daily audience sizes in 2021.** This chart shows the dominance of digital media in 15-24s' daily lives. Nearly all watch (overseas) online video or listen to streamed music each day. Three quarters watch SVOD, one in two play online gaming and one in five listen to a podcast. TV and radio are the most popular traditional media but reach fewer than four in ten 15-24s each day.

## Daily reach of all media 2021 – All New Zealanders 15+ and all 15-24s.

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

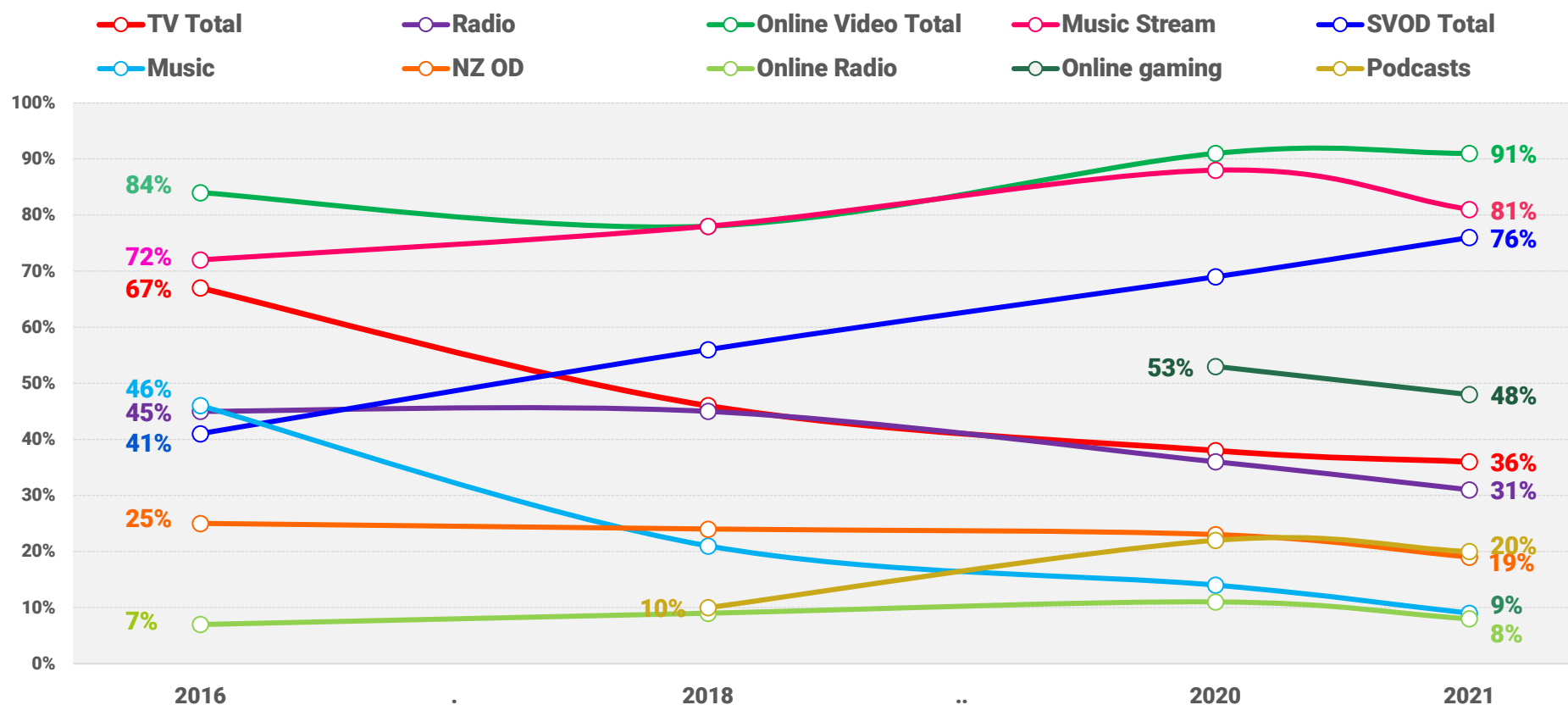


Note:  
TV viewing includes live and time shifted viewing, in and out of home.  
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.

**Daily audience sizes over time.** The daily online video audience is stable among 15-24s since 2020, as is the overall TV audience. The number of 15-24 year olds watching SVOD has increased significantly, while the audience using nearly all other media has declined slightly since 2020 with the biggest declines evident in music streaming, newspapers and music on physical formats.

## Daily reach of media over time – All 15-24s.

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



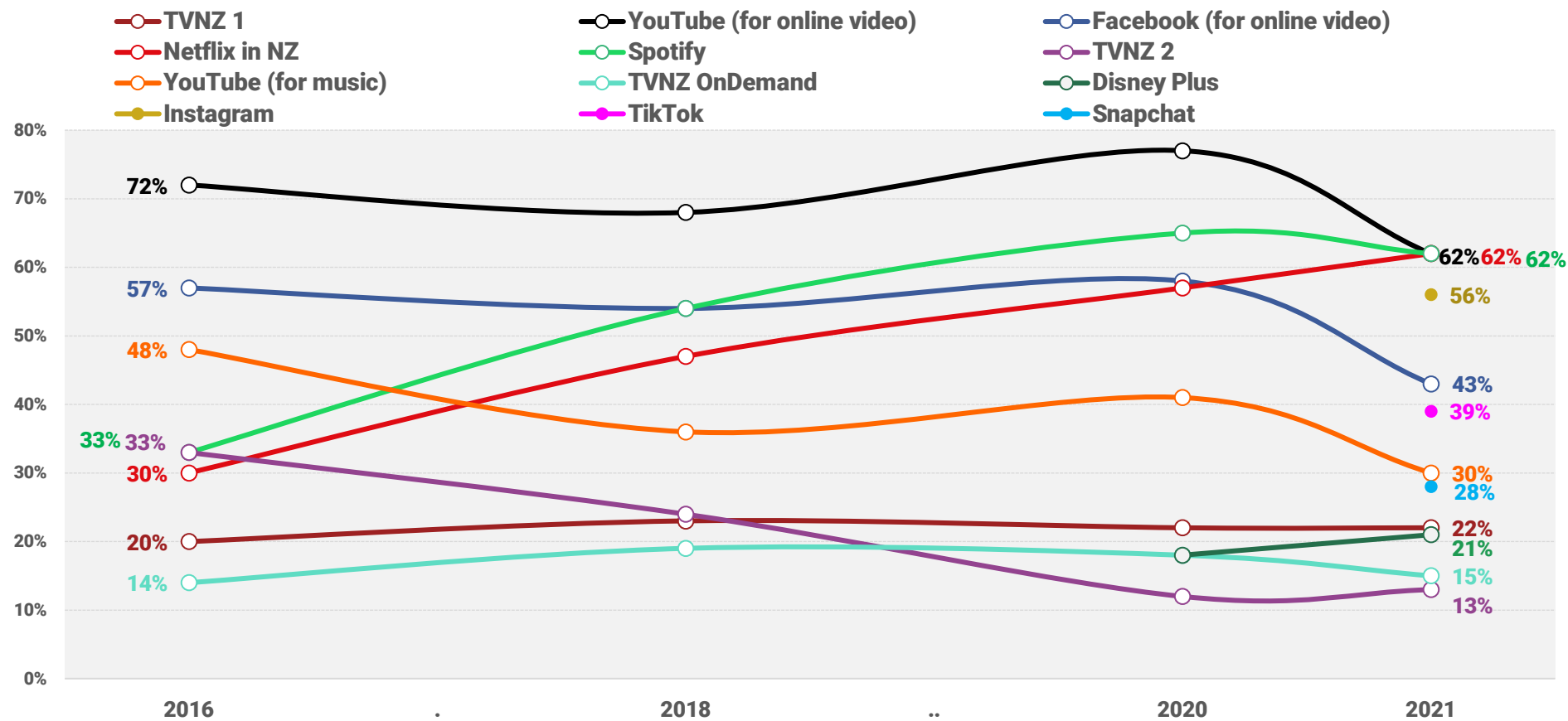
Note: TV viewing includes live and time shifted viewing, in and out of home.  
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.

Base: All 15-24s: (2016 n=249; 2018 n=221; 2020 n=262; 2021 n=251).

**Most popular channels, sites and stations 2020.** YouTube (for video), Netflix and Spotify attract the biggest audiences among 15-24 year olds each day, with Instagram slightly below these. YouTube and Facebook (for video) have declined in audience size among this group in the last 12 months. TVNZ 1 is the most popular traditional media provider.

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

Q: Which of the following did you use yesterday?



- Next tier:**
- The Edge 10%
  - NZ Herald (video) 10%
  - Three 9%
  - Stuff (video) 9%
  - Amazon Prime 7%





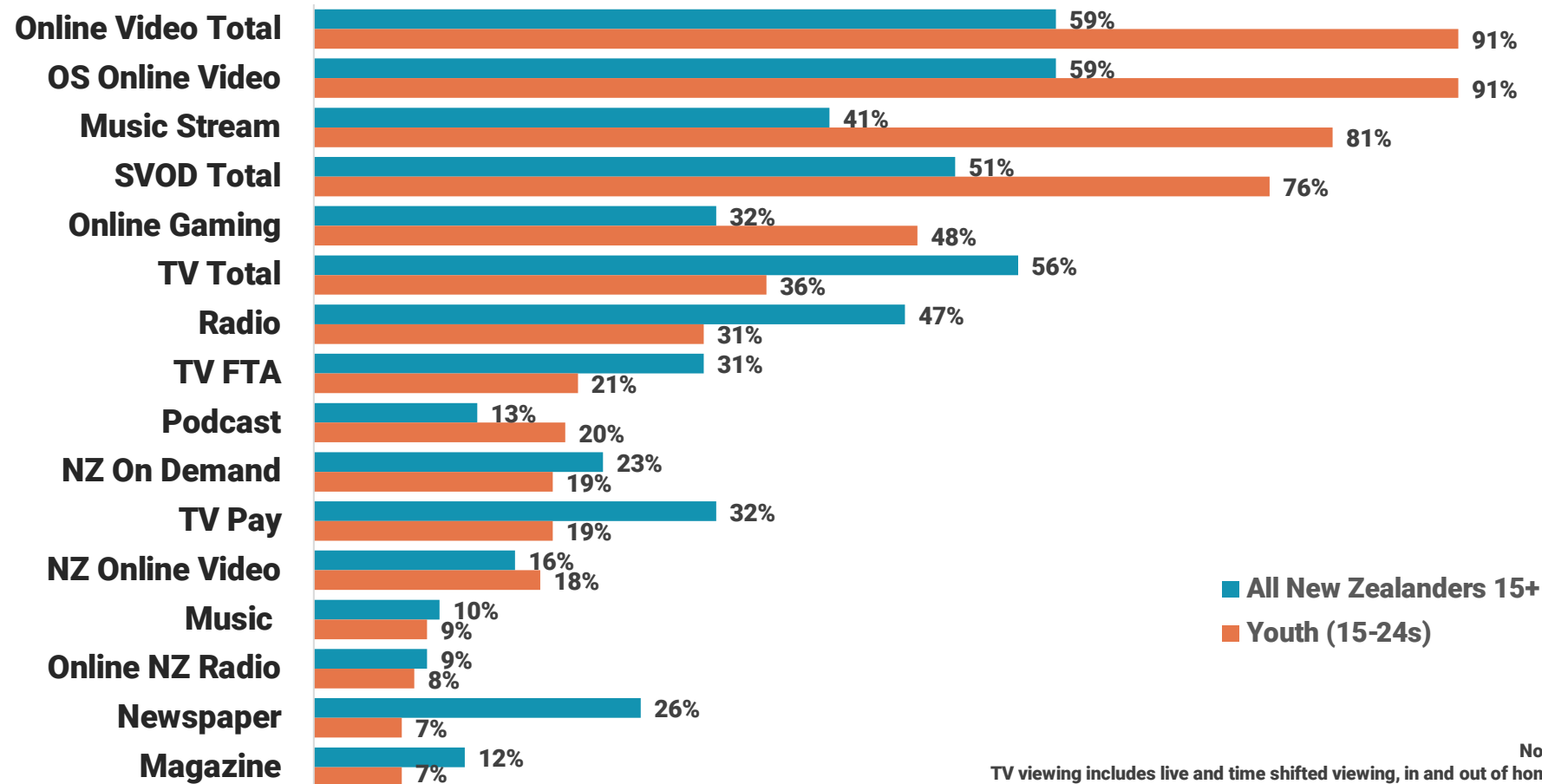
# Daily Media Consumption



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

## Daily reach of all media 2021 – All New Zealanders 15+ and all 15-24s.

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



On demand, music on physical formats and online NZ radio are the only media where the consumption patterns of 15-24s are similar to that of the general population.

Nearly all 15-24s watch overseas online video with one in five of this group also watching NZ based online video. There is no evidence of 15-24s watching NZ based online video only.

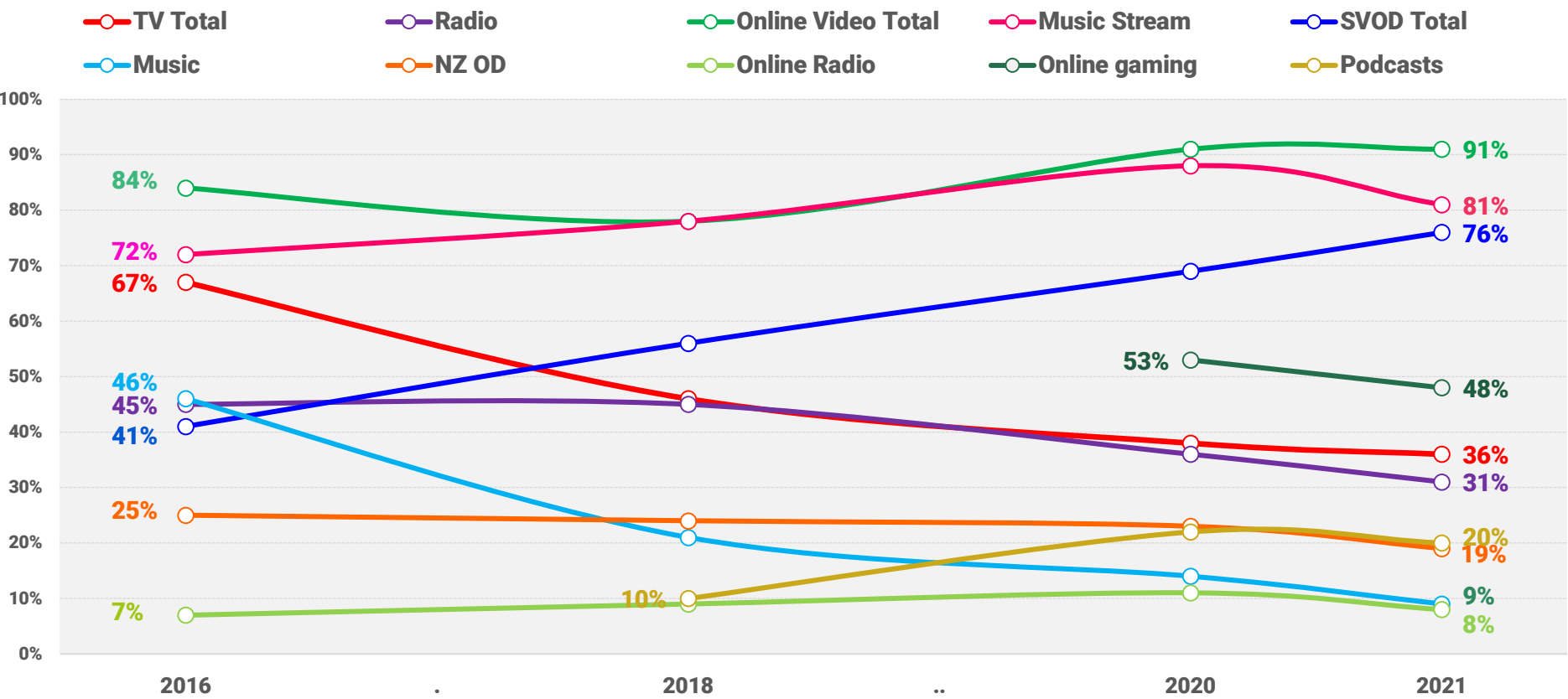
Note:  
TV viewing includes live and time shifted viewing, in and out of home.  
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.



The daily online video audience is stable among 15-24s since 2020, as is the overall TV audience. The number of 15-24 year olds watching SVOD each day has increased significantly, while the audience using nearly all other media has declined slightly in the last 12 months. The biggest declines are evident in music streaming, newspapers and music on physical formats.

Daily reach of media over time – All 15-24s.

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



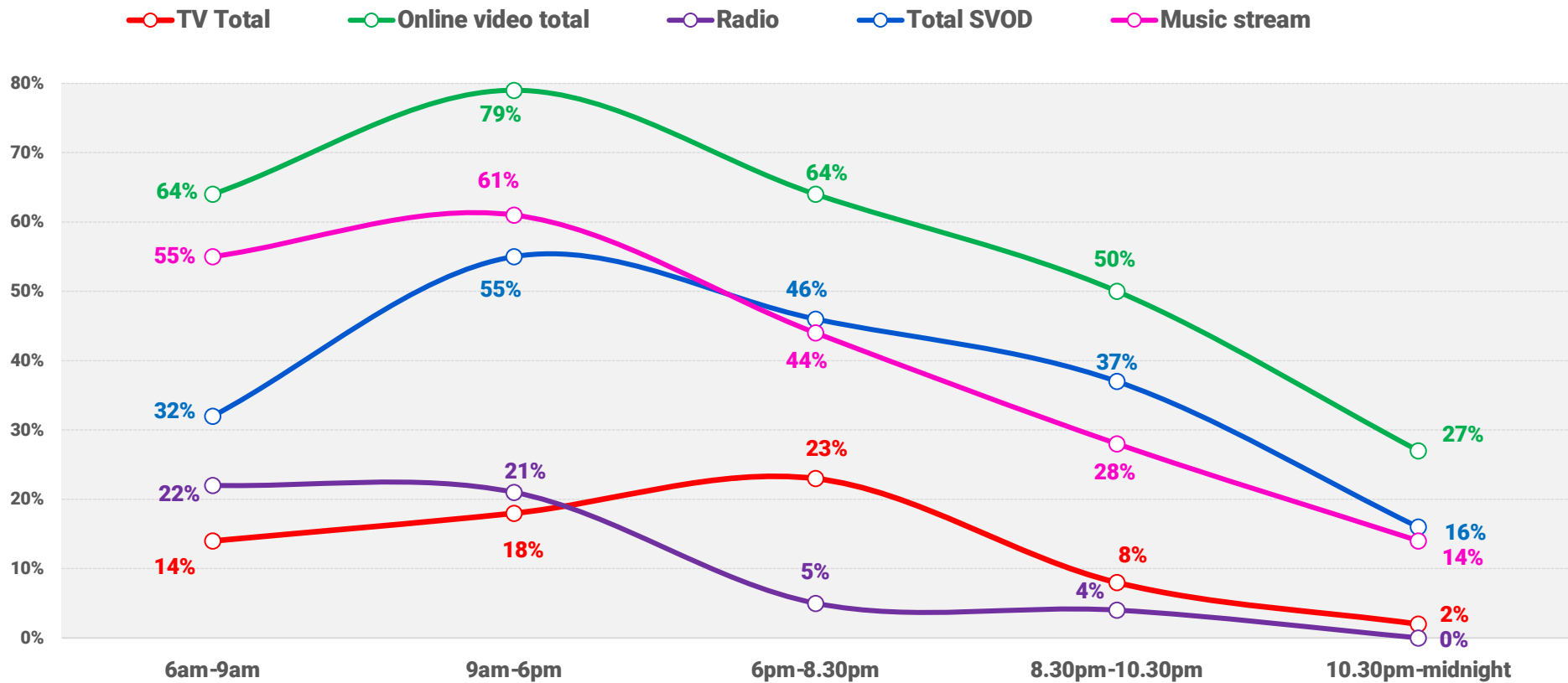
Note: TV viewing includes live and time shifted viewing, in and out of home.  
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.

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



Reach of media over the day 2021 – all 15-24s.

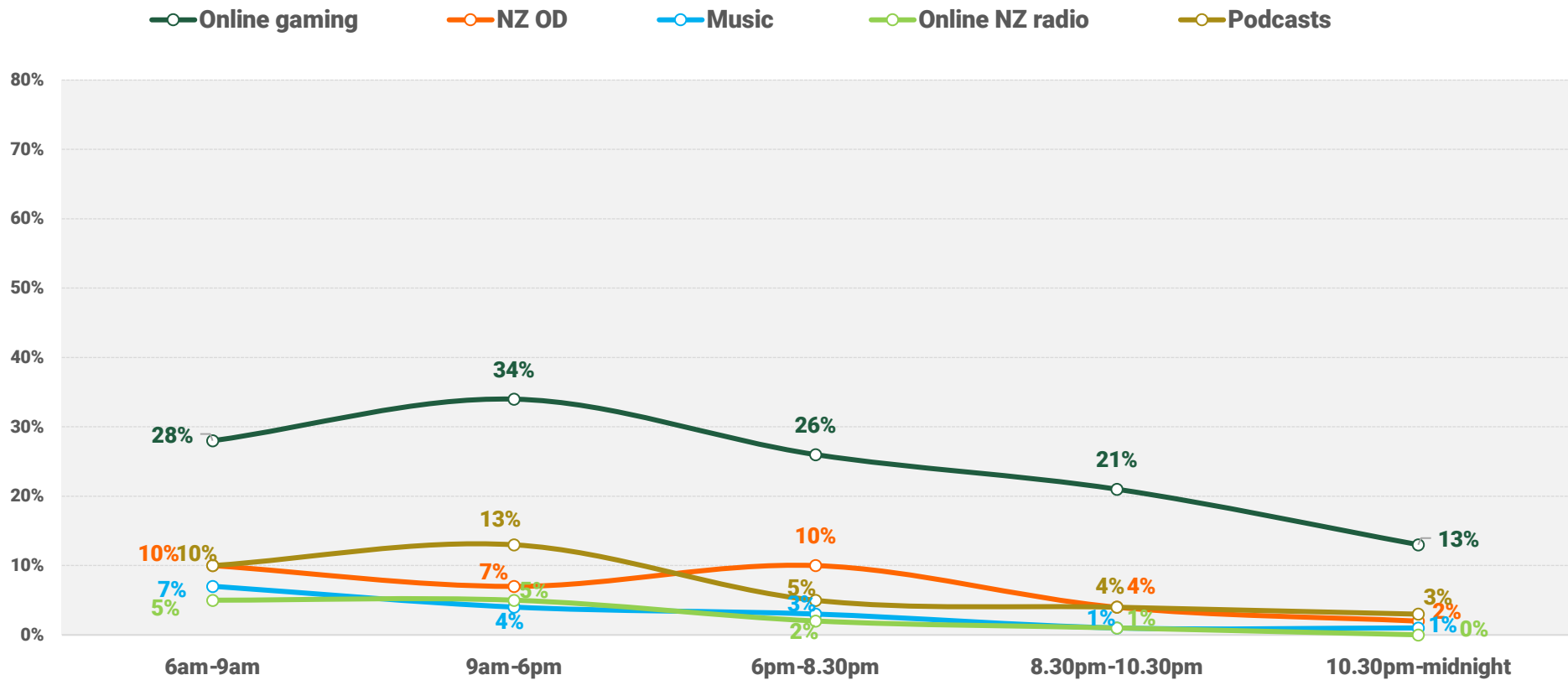
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Online gaming attracts larger audiences than TV and radio throughout the day. Podcasts are most popular in the morning and during the day, but do not reach more than 5% in any zone of the day.

Reach of media over the day 2021 – all 15-24s.

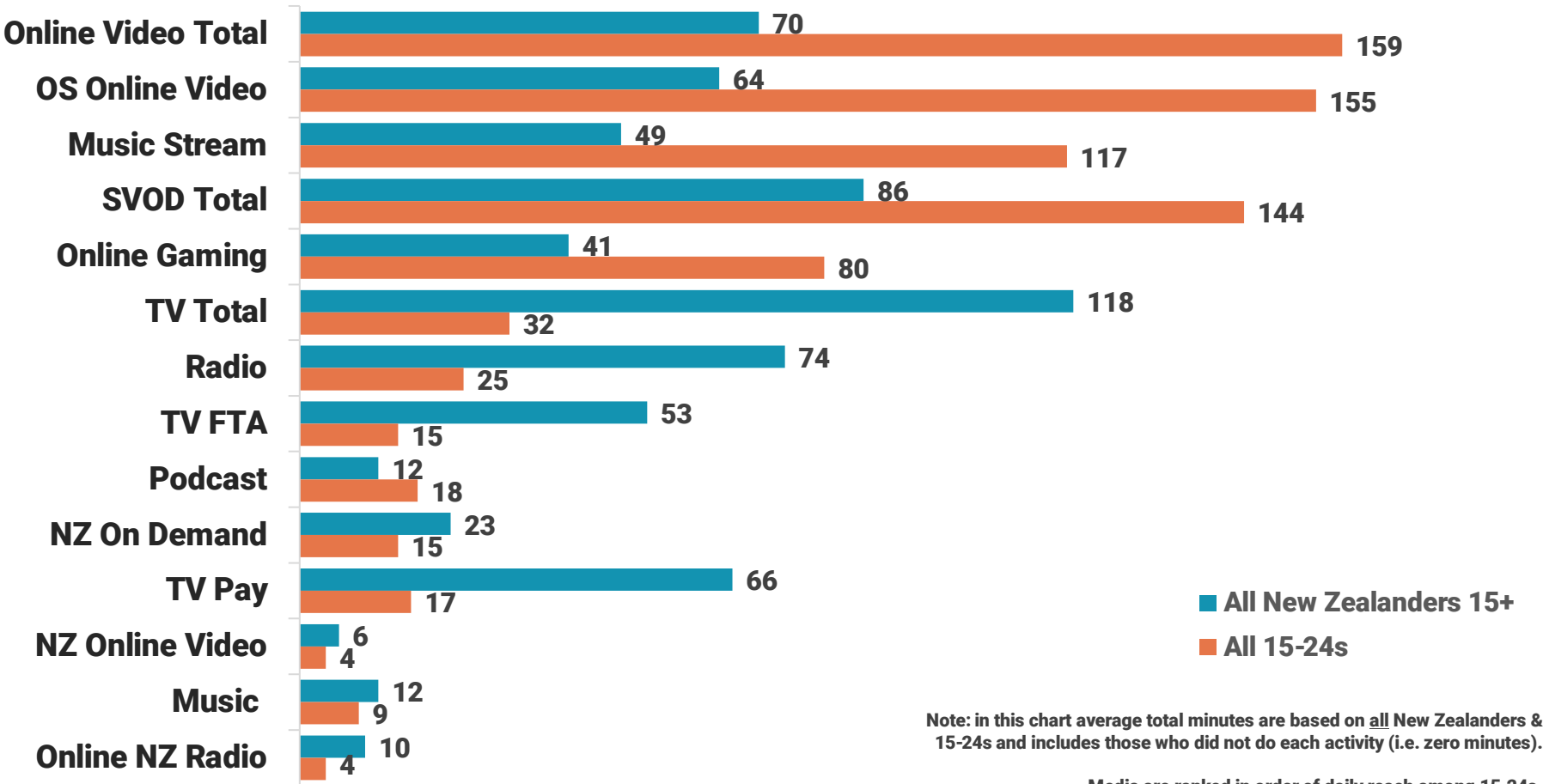
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



Digital media not only attracts the biggest audiences among 15-24s, but this age group also dedicate the most time to these media each day. 15-24s spend more than 2½ hours watching online video, nearly all of which is overseas online video. This age group watch SVOD for slightly less time each day (144 mins) and listen to streamed music for just under 2 hours each day.

Time spent consuming media 2021 – average minutes per day. All New Zealanders 15+ and all 15-24s.

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



The traditional media that 15-24s dedicate the most time to is TV, but this is just 32 minutes on average, compared to nearly two hours among overall New Zealanders 15+.

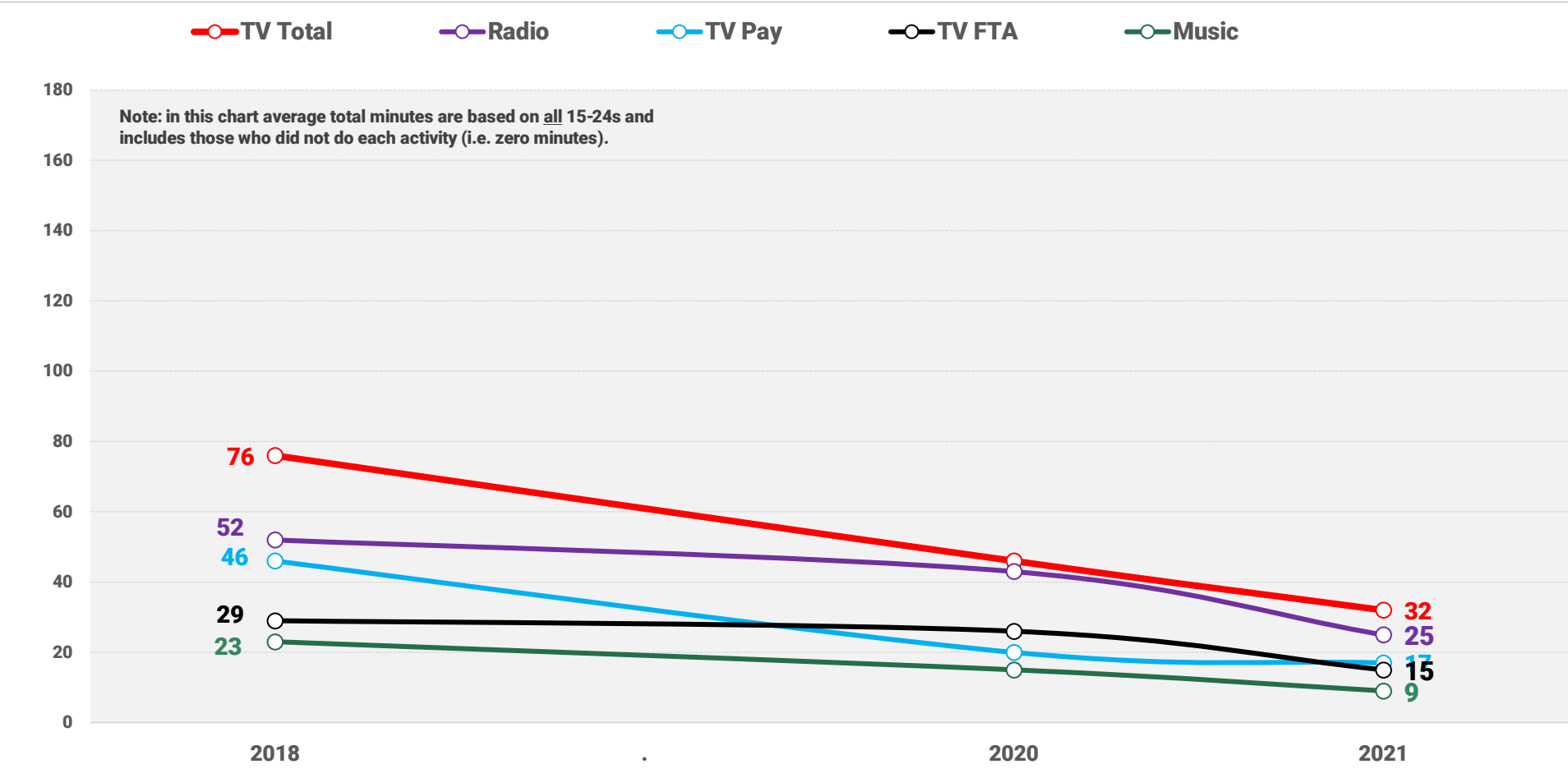
Note: in this chart average total minutes are based on all New Zealanders & 15-24s and includes those who did not do each activity (i.e. zero minutes).

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

Time spent using all traditional media has declined significantly again since 2020. 15-24 year olds now spend no more than half an hour each day using any one traditional media.

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

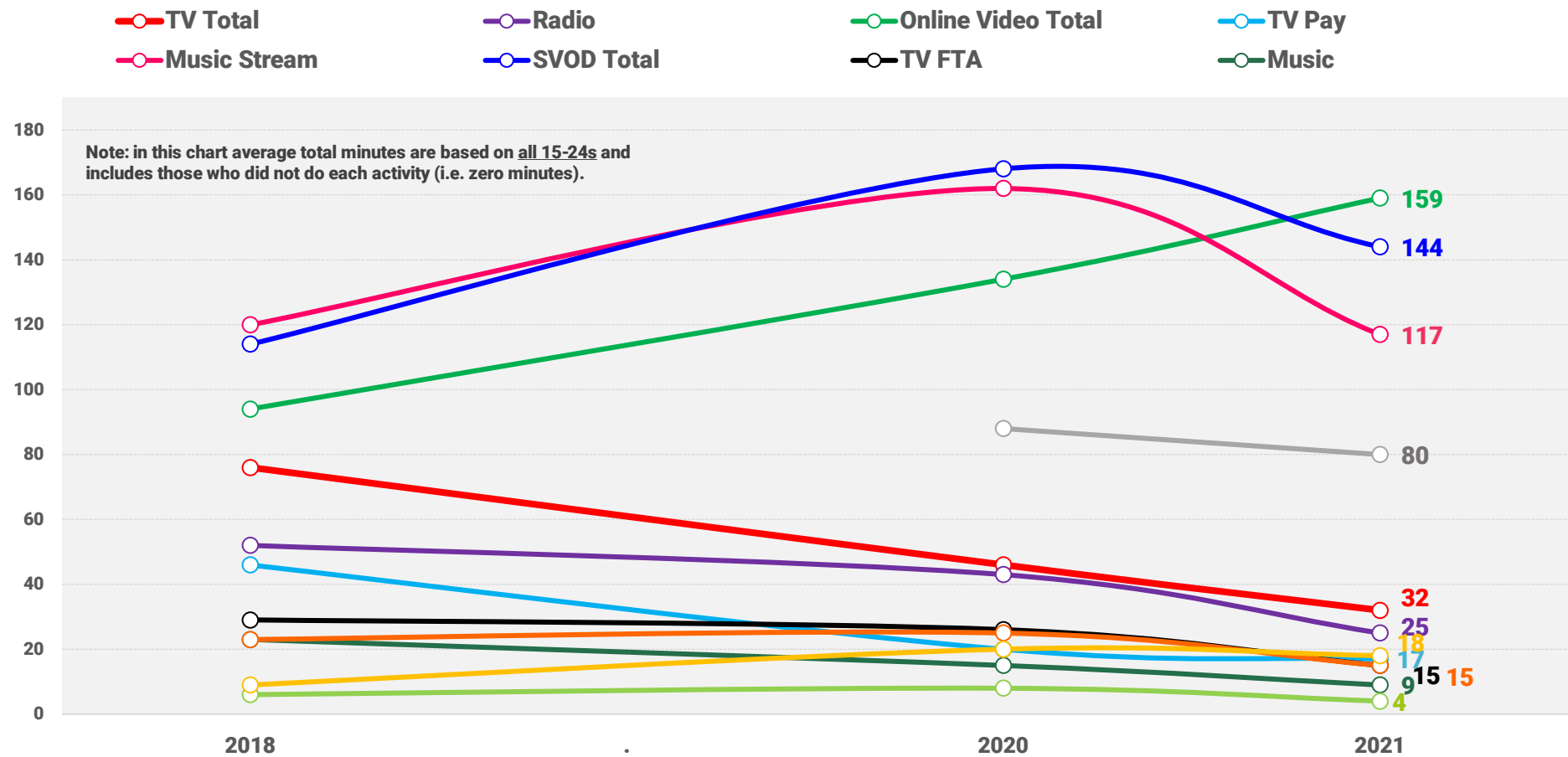
Q: Between (TIME PERIOD) about how long did you do (activity) for?



Online video is now the media that 15-24s dedicate the most time to each day. The amount of time 15-24s dedicate to all other types of digital media has declined since 2020. There is evidence to suggest Covid 19 levels 1 and 2 drove greater time spent using some media rather than increasing the size of audiences.

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

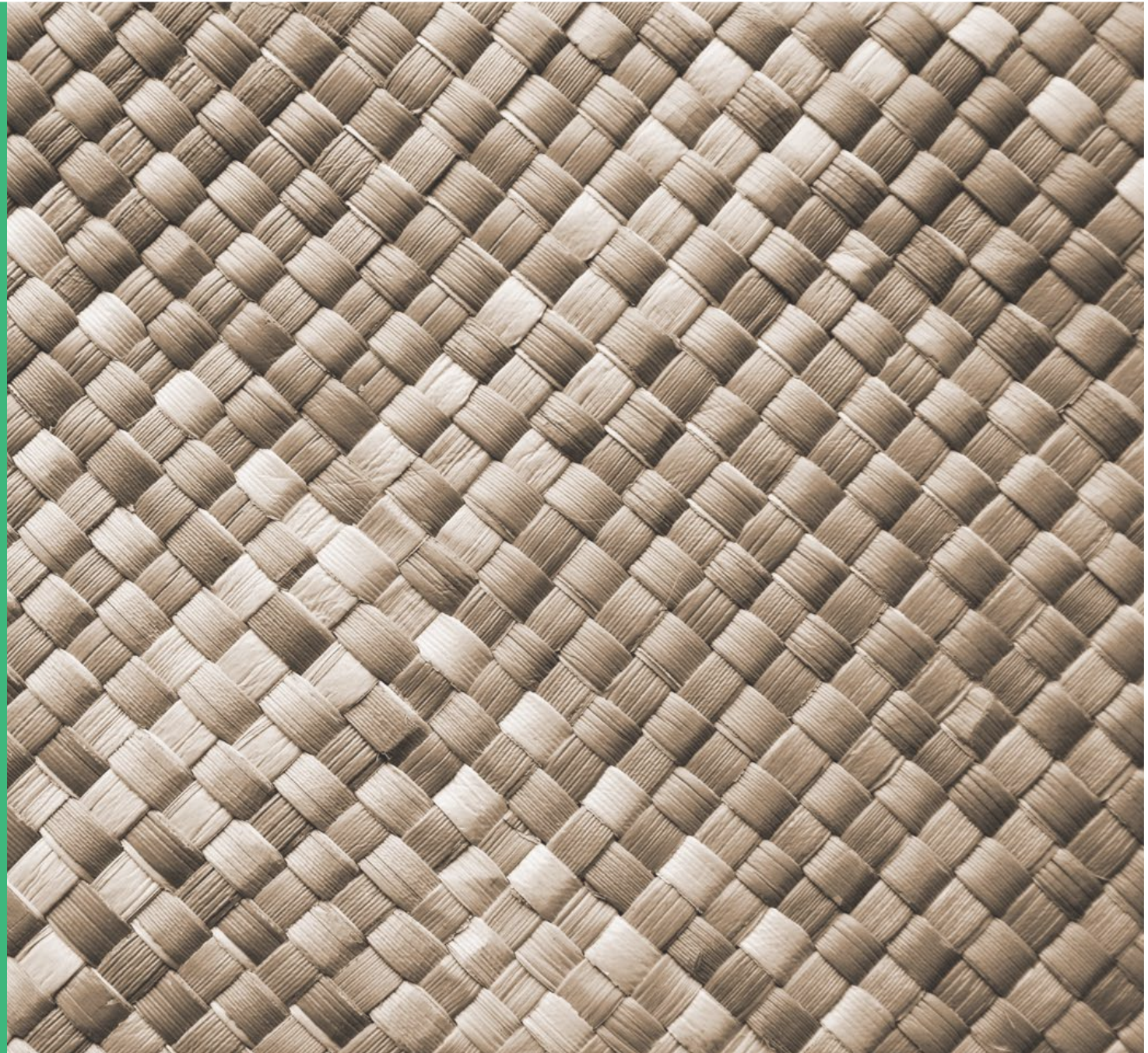
Q: Between (TIME PERIOD) about how long did you do (activity) for?







# Daily Media Consumption By Channel, Site & Station



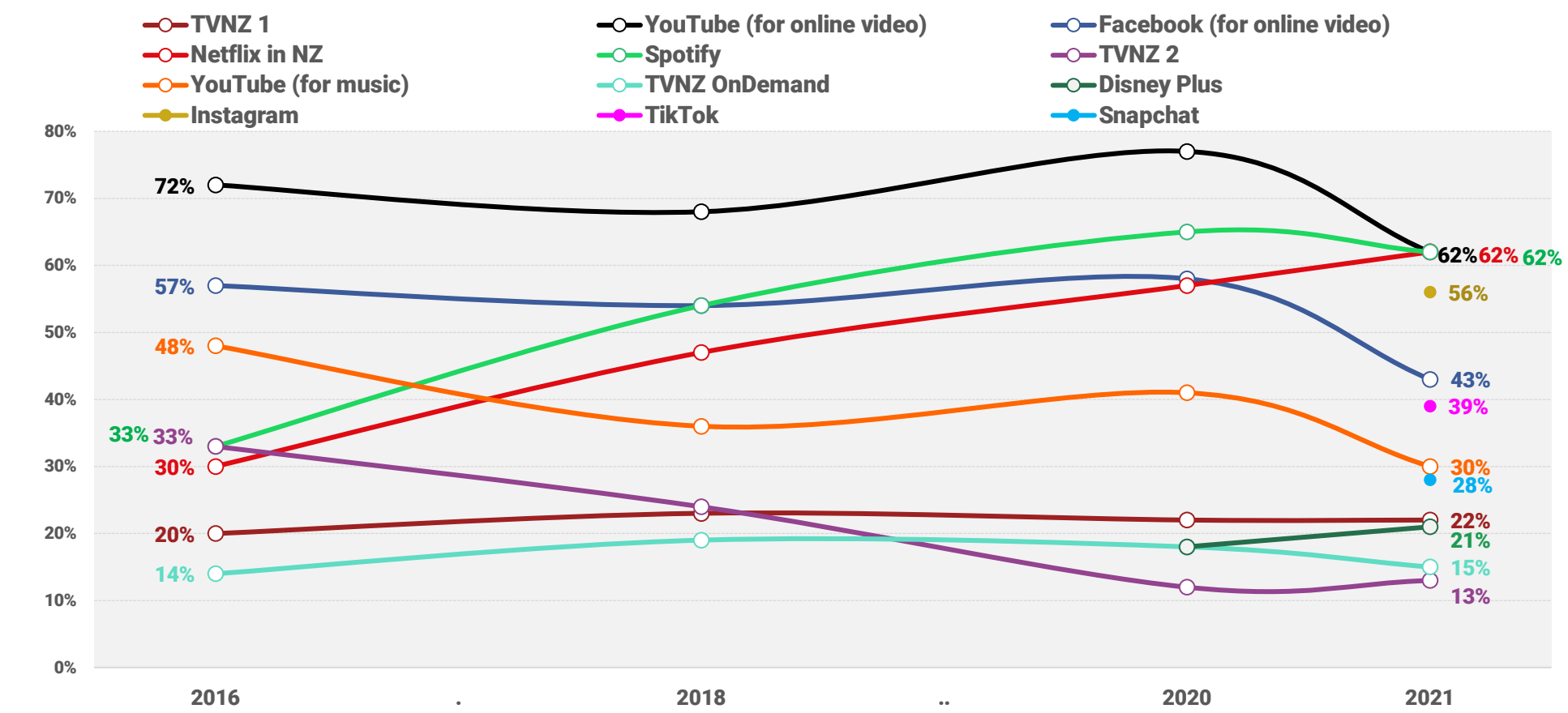


**YouTube (for video), Netflix and Spotify attract the biggest audiences among 15-24 year olds each day, with Instagram slightly below this. YouTube and Facebook (for video) have declined in audience size among this group in the last 12 months. TVNZ 1 is the most popular traditional media provider and its audience has been stable since 2016.**



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

Q: Which of the following did you use yesterday?



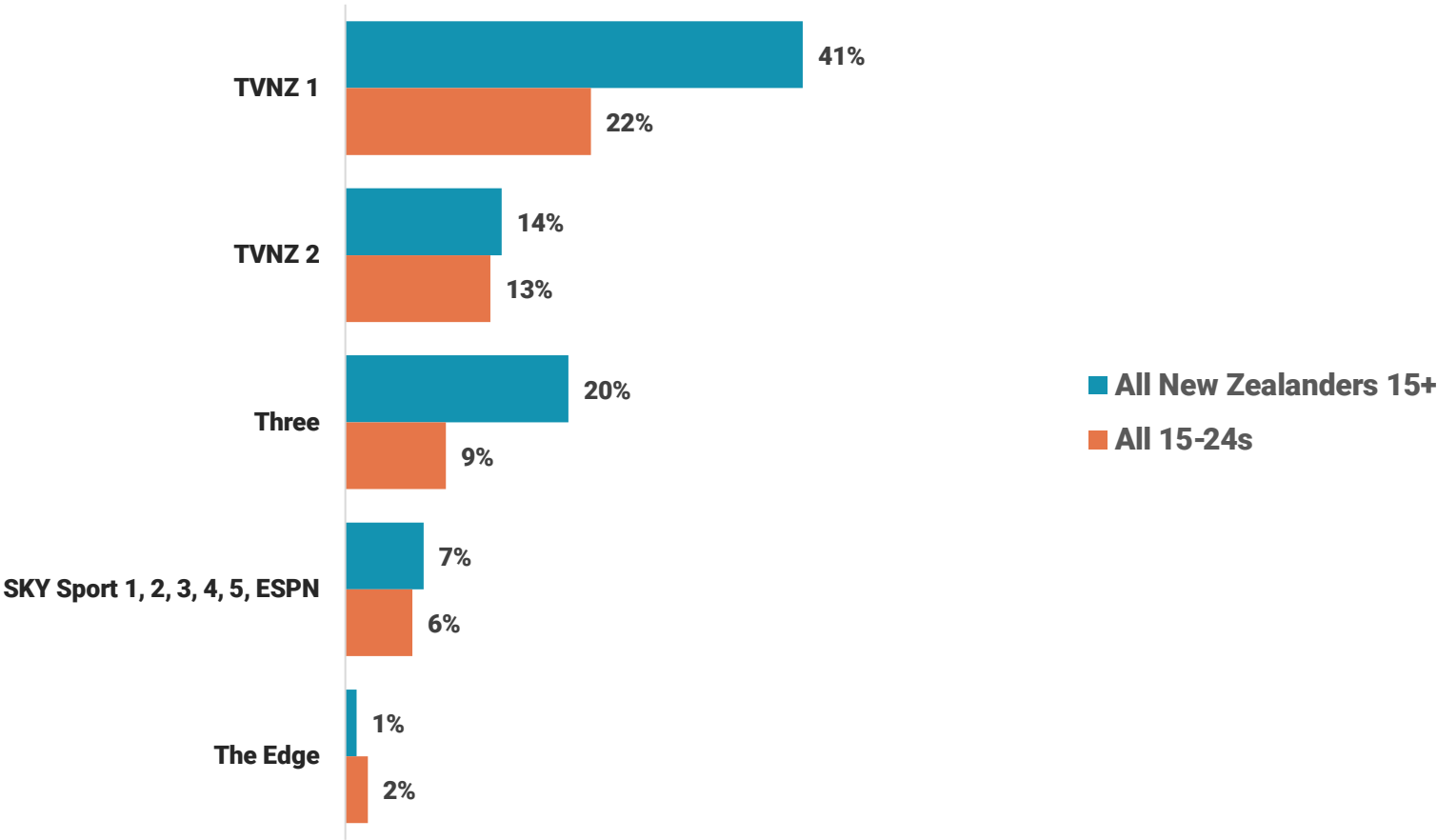
- Next tier:**
- The Edge 10%
  - NZ Herald (video) 10%
  - Three 9%
  - Stuff (video) 9%
  - Amazon Prime 7%



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

## Daily reach of TV channels 2021 – all New Zealanders 15+ & all 15-24s (2% reach or more).

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



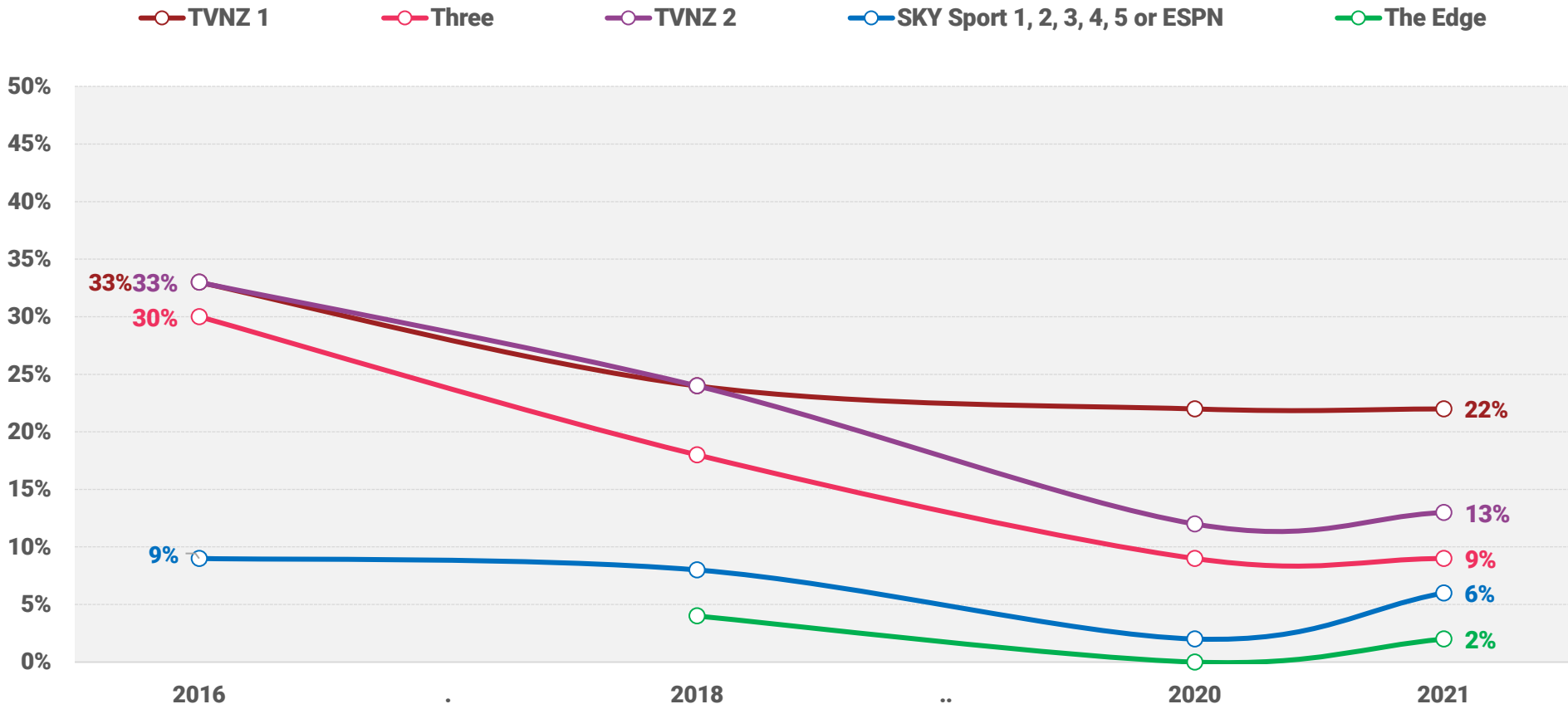
There is a wide range of TV channels that reach 1% of 15-24s each day:

- SKY 5
- Comedy Central
- Maori TV
- Prime
- Discovery
- Living
- SKY Movies channels
- SKY Kids channels
- E
- Soho
- Crime & Investigation
- Choice TV
- Bravo

While there are now just five TV channels that reach 2% or more of 15-24s each day, these channels' audiences are stable since 2020. SKY Sport channels show growth since 2020 when there was no live sport available.

Daily reach of TV channels (2% reach and over) – all 15-24s.

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



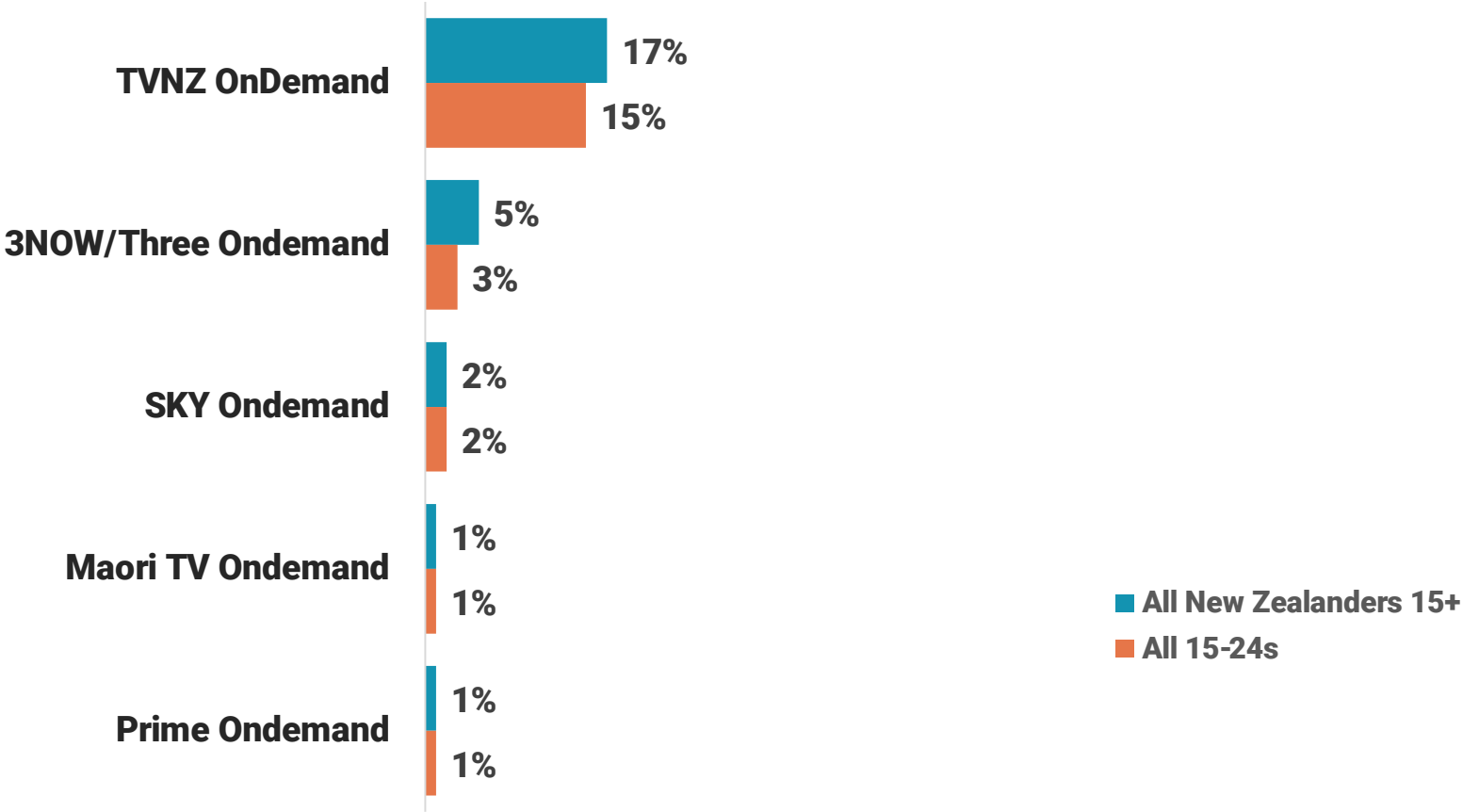
Since 2020 Prime, SKY Movies channels, Bravo and Maori TV have dropped below the 2% daily reach threshold.

# TVNZ OnDemand is the most popular on demand site among 15-24s, attracting 15% of this group each day.



## Daily reach of on demand sites 2021 – All New Zealanders 15+ & all 15-24s.

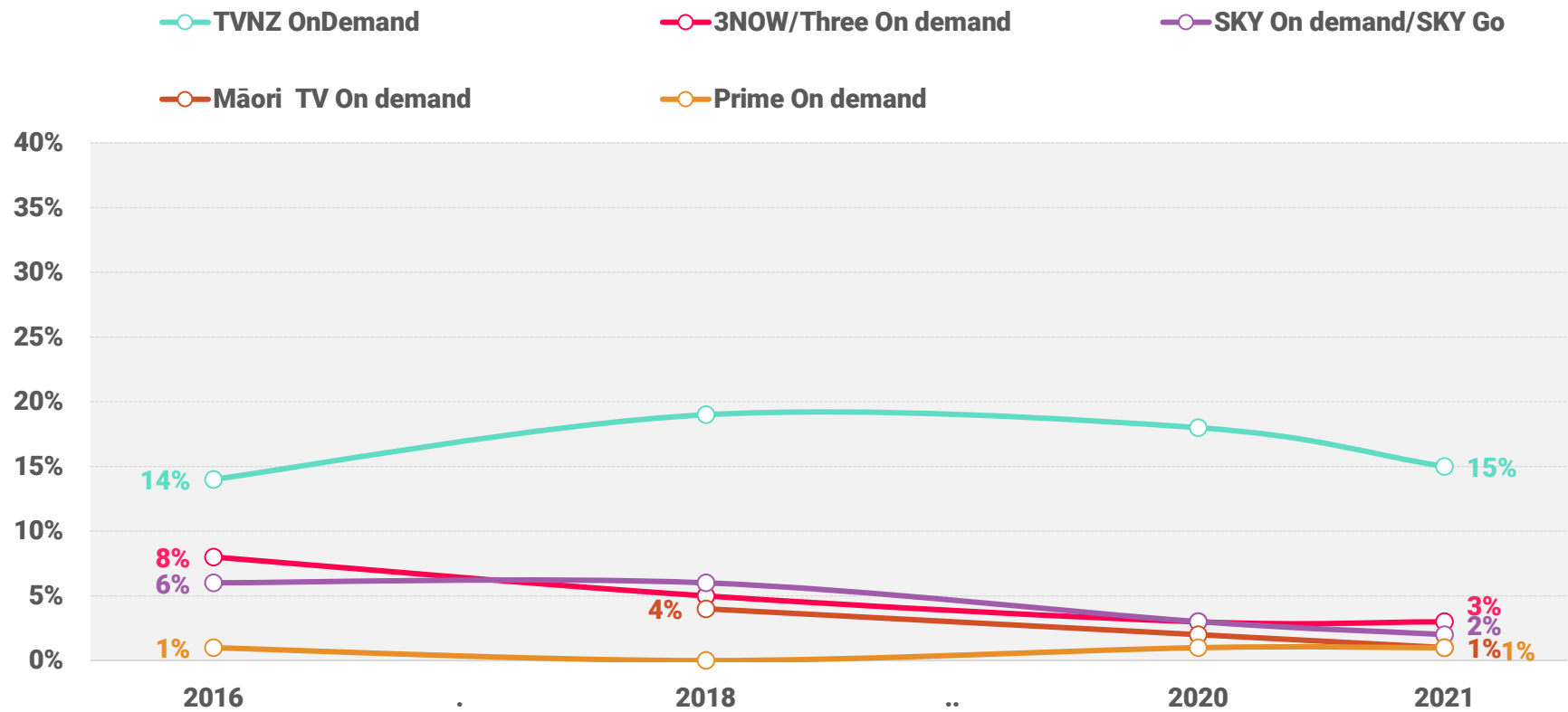
Q: Thinking about yesterday overall, which of the following websites did you watch?



Audiences using each on demand site are relatively stable with TVNZ OnDemand showing only a slight decline since 2020.

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

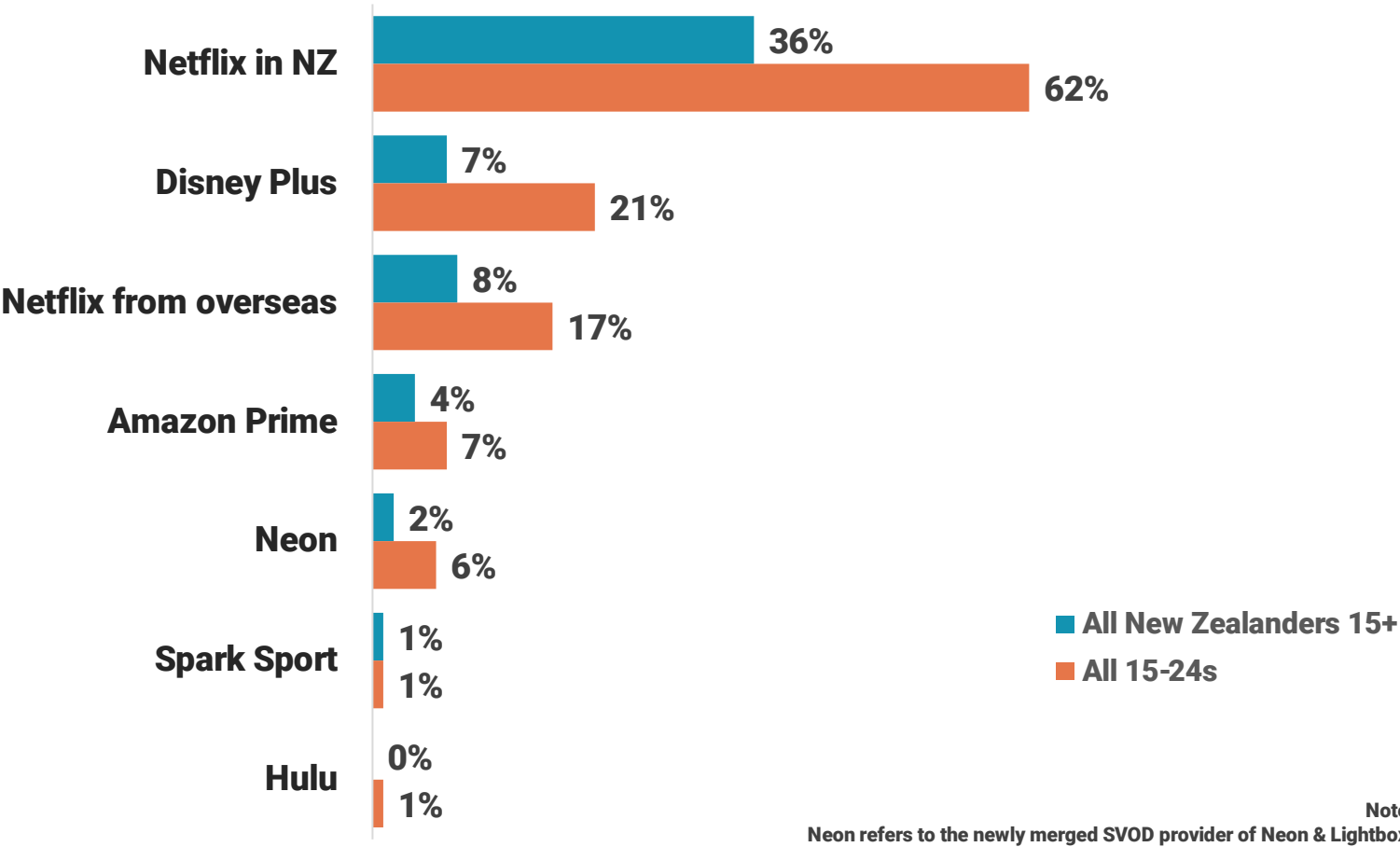
Q: Thinking about yesterday overall, which of the following websites did you watch?



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

Daily reach of SVOD sites 2021 – All New Zealanders 15+ & all 15-24s.

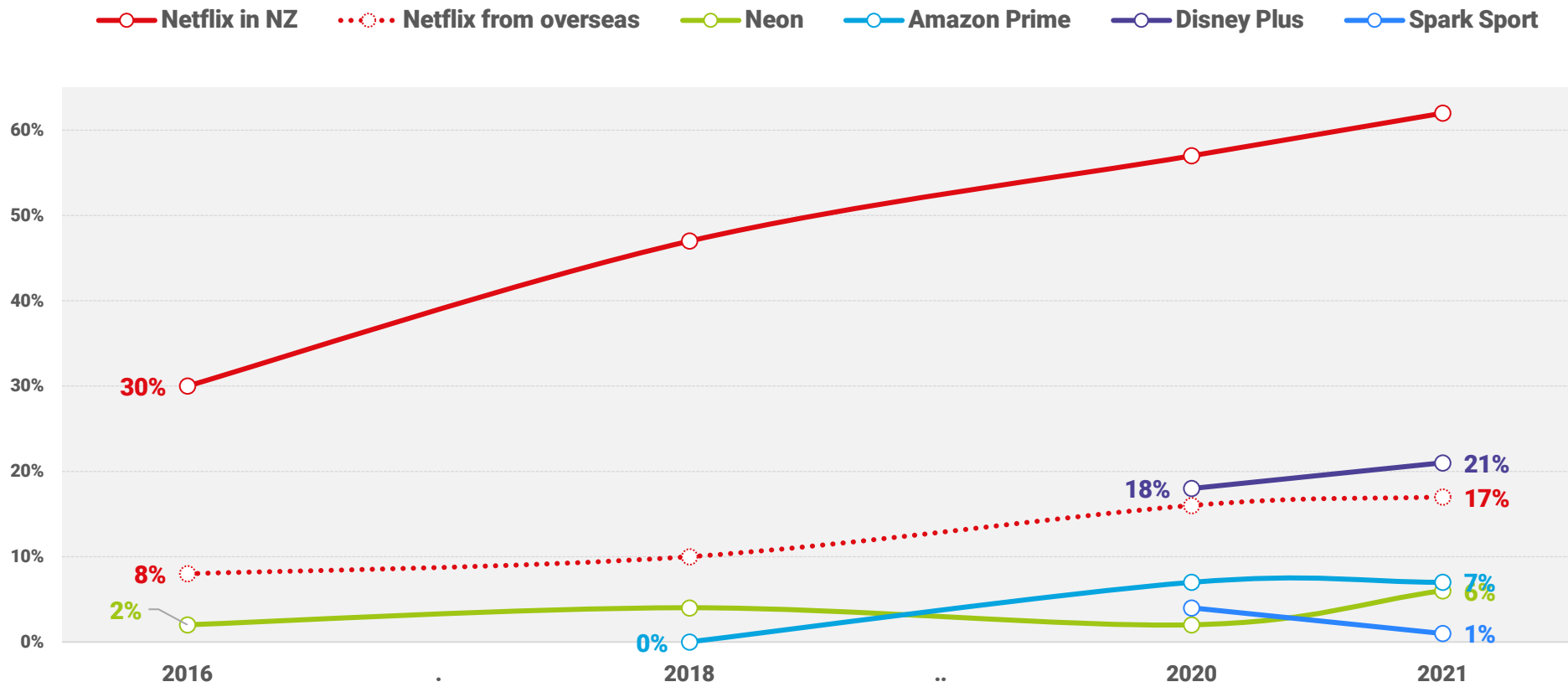
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



**Netflix has continued to grow its daily audience among 15-24s since 2020. Disney Plus has also grown its audience, now reaching one in five 15-24s each day, while the newly merged Neon has grown to reach 6% of 15-24s each day. Spark Sport's audience among 15-24s has declined in the last 12 months.**

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

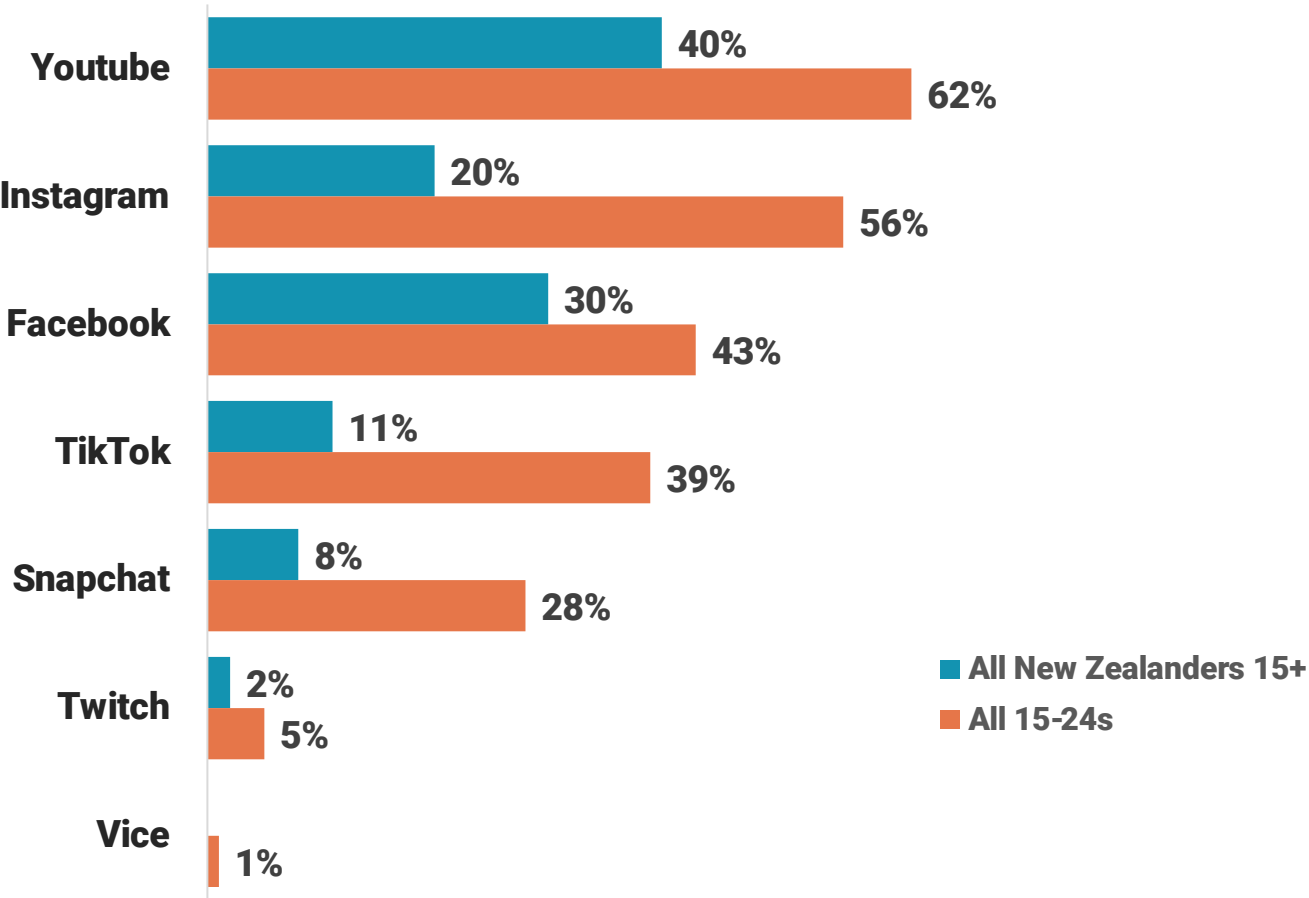
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



**15-24s are significantly more likely to watch video online using all the main overseas sites. In particular 15-24s are more likely to use Instagram, TikTok and Snapchat with Instagram almost as widely used as YouTube each day.**

**Daily reach of overseas online video sites 2021 – All New Zealanders 15+ & all 15-24s.**

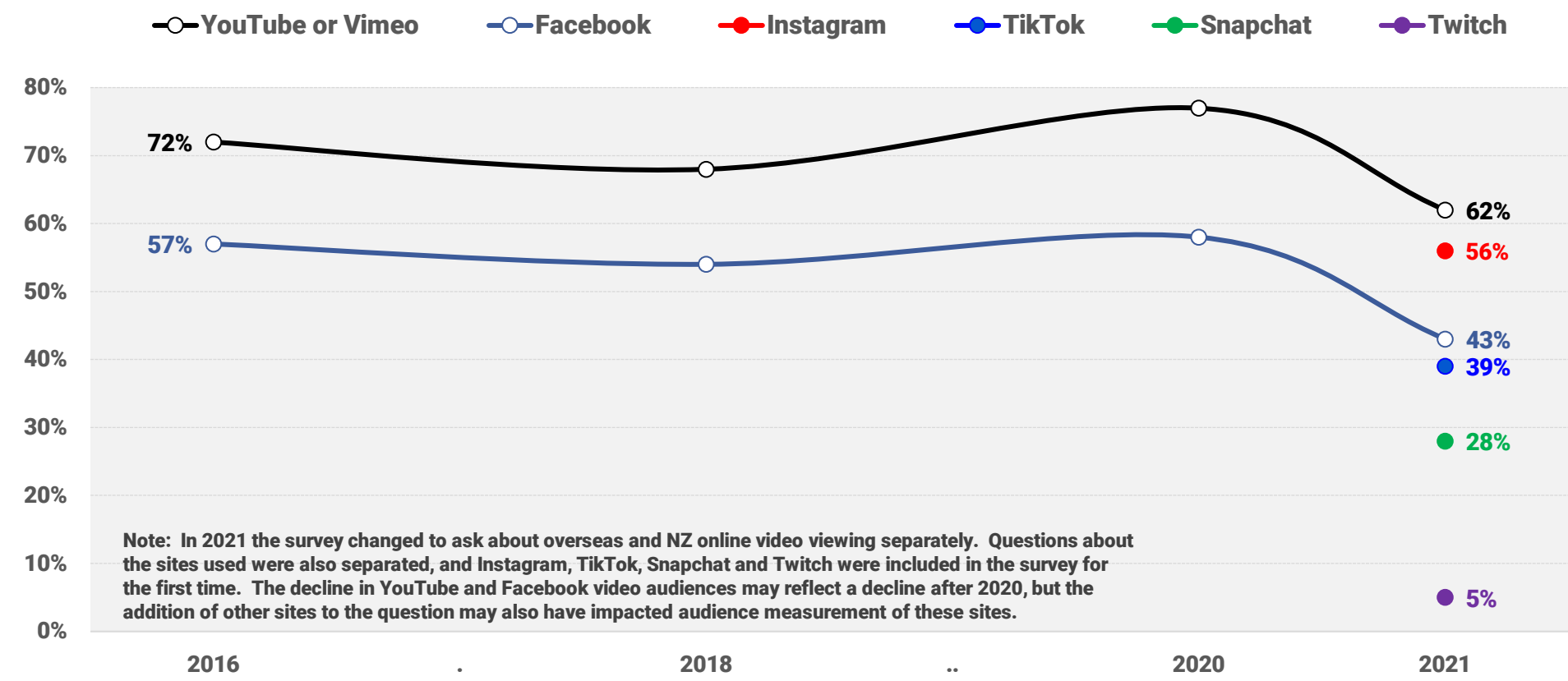
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



# Both YouTube and Facebook (for video) show declines in audience since 2020.

## Daily reach of overseas online video sites – all 15-24s (sites with 2% reach or above).

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

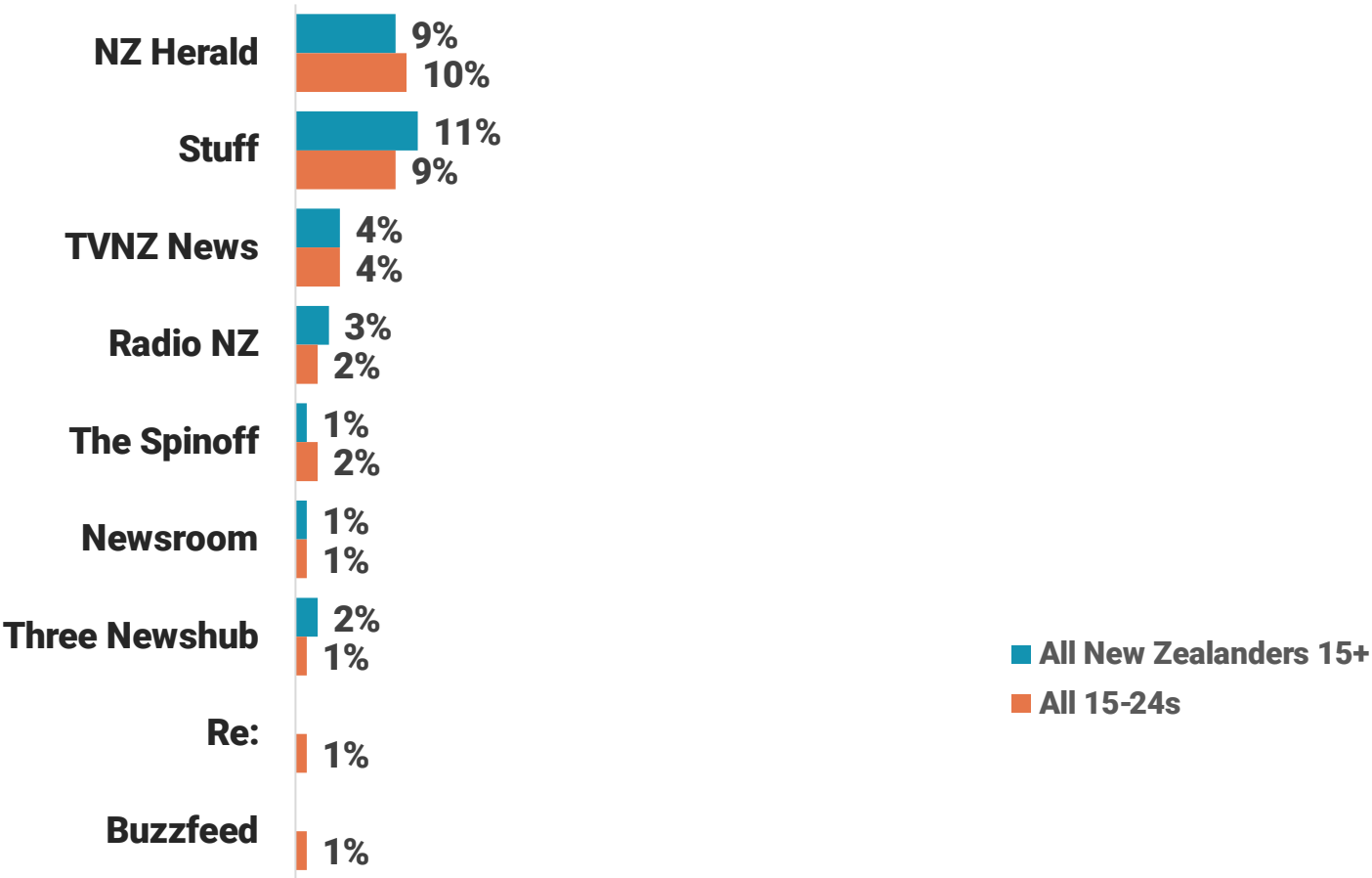




15-24s are just as likely to watch online video using NZ based sites as overall New Zealanders aged 15+. NZ Herald and Stuff each attract one in ten 15-24s each day.

Daily reach of NZ online video sites 2021 – All New Zealanders 15+ & all 15-24s.

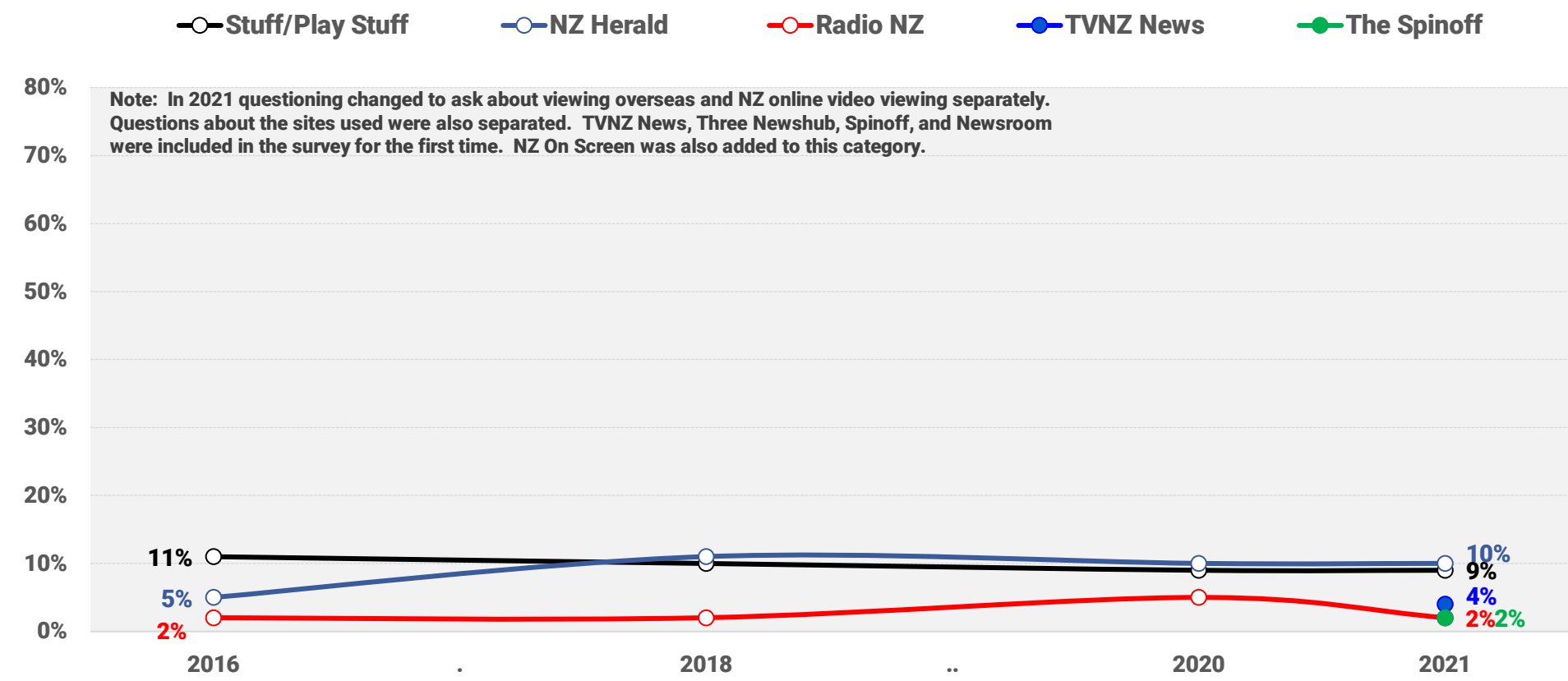
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



# The audiences watching online video on NZ sites are relatively stable other than a slight decline in watching video on Radio NZ.

## Daily reach of NZ online video sites – all 15-24s (sites with 2% reach or more).

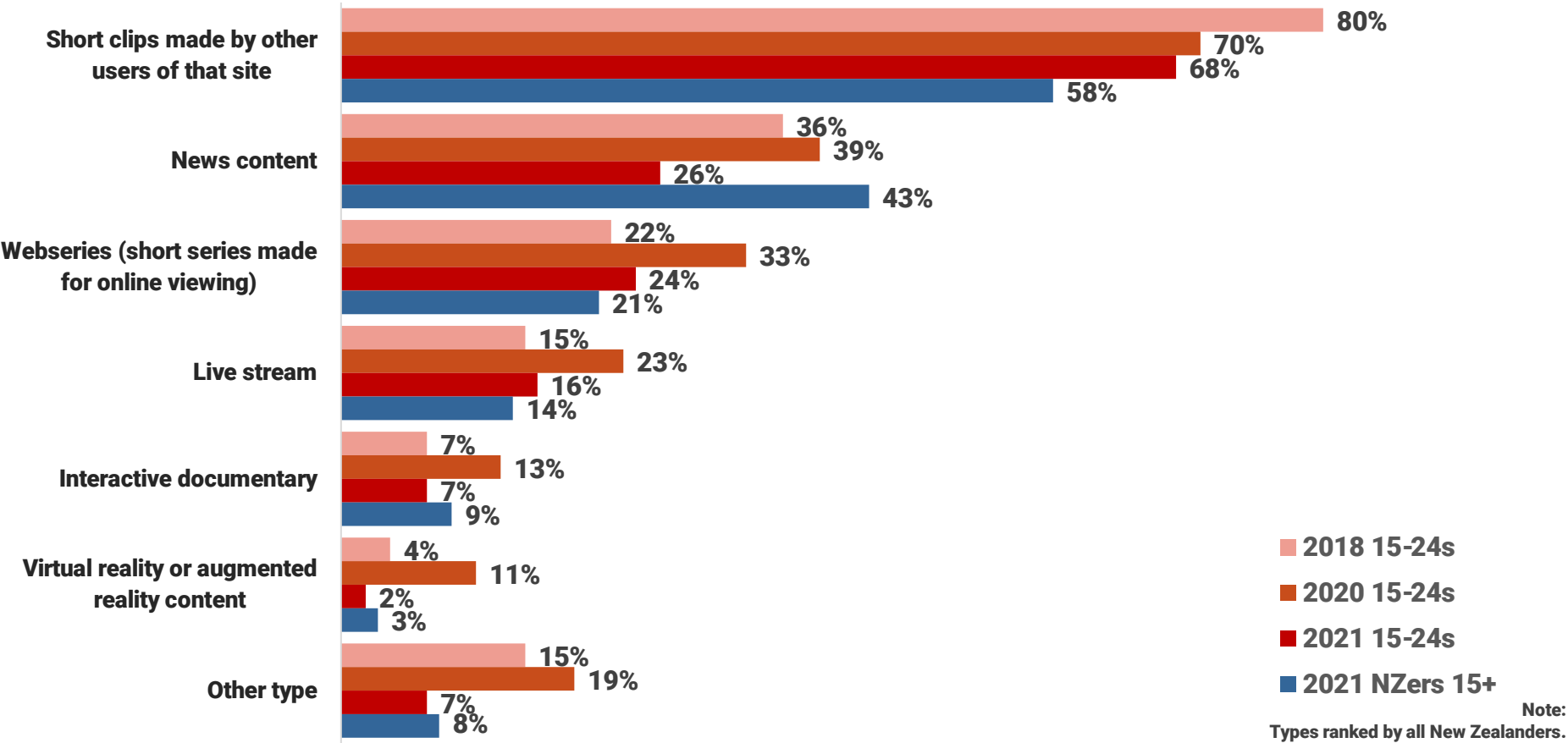
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



15-24s are significantly more likely to watch short user generated online video than average and are now even less likely to watch news content than overall New Zealanders 15+. Viewing of other types of online video among 15-24s is similar to the behaviour of overall New Zealanders 15+.

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

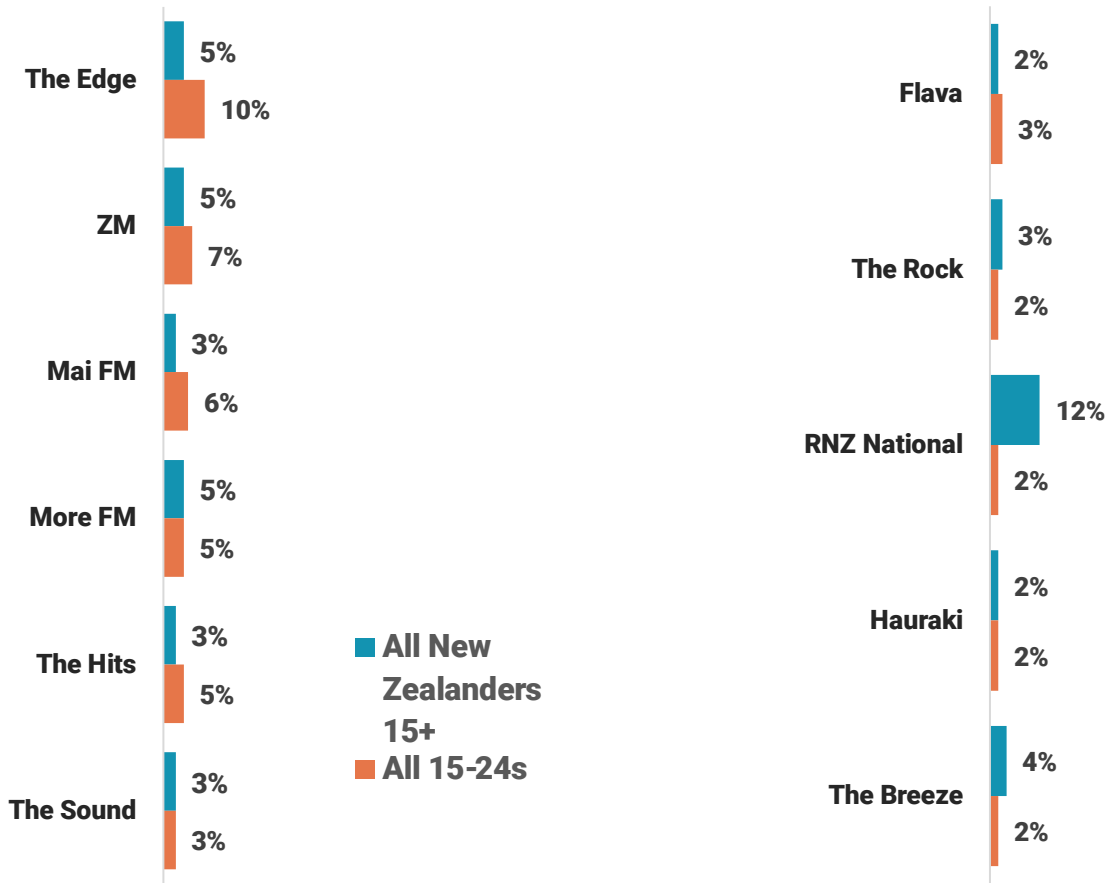
Q: Which of the following types of video did you watch on these sites?



15-24s are less likely to listen to the radio overall, so the daily reach of individual stations is similarly lower. However one in ten listen to The Edge each day, and 15-24s are more likely to listen to Mai FM and The Edge more than overall New Zealanders 15+.

Daily reach of radio stations 2021 (2% reach and above) – all New Zealanders 15+ and all 15-24s.

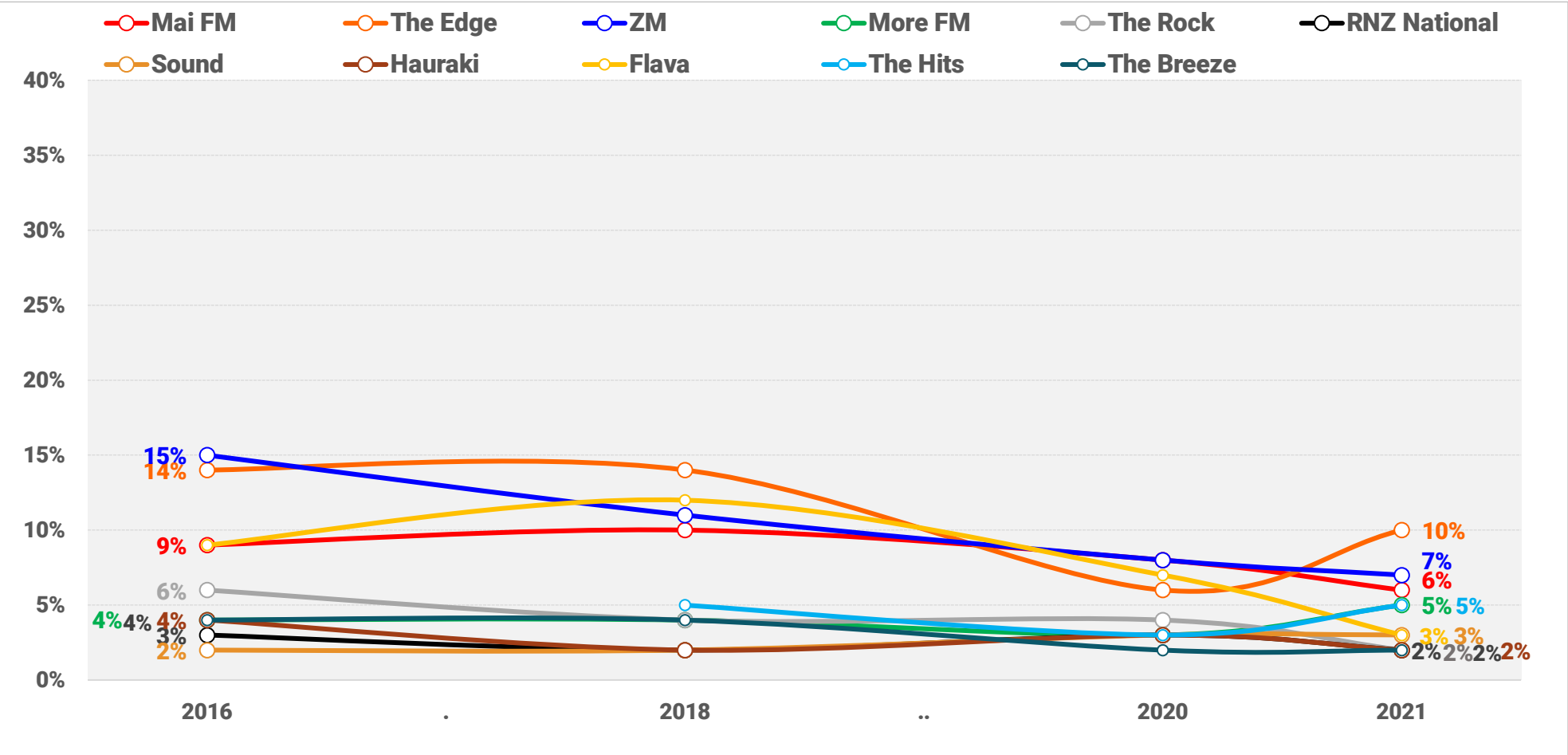
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



The daily audiences listening to the most popular radio stations are mostly stable with only minor increases or declines since 2020. The exception is The Edge which has regained some of the audience it dropped in 2020.

Daily reach of radio stations over time (2% reach and above) – all 15-24s.

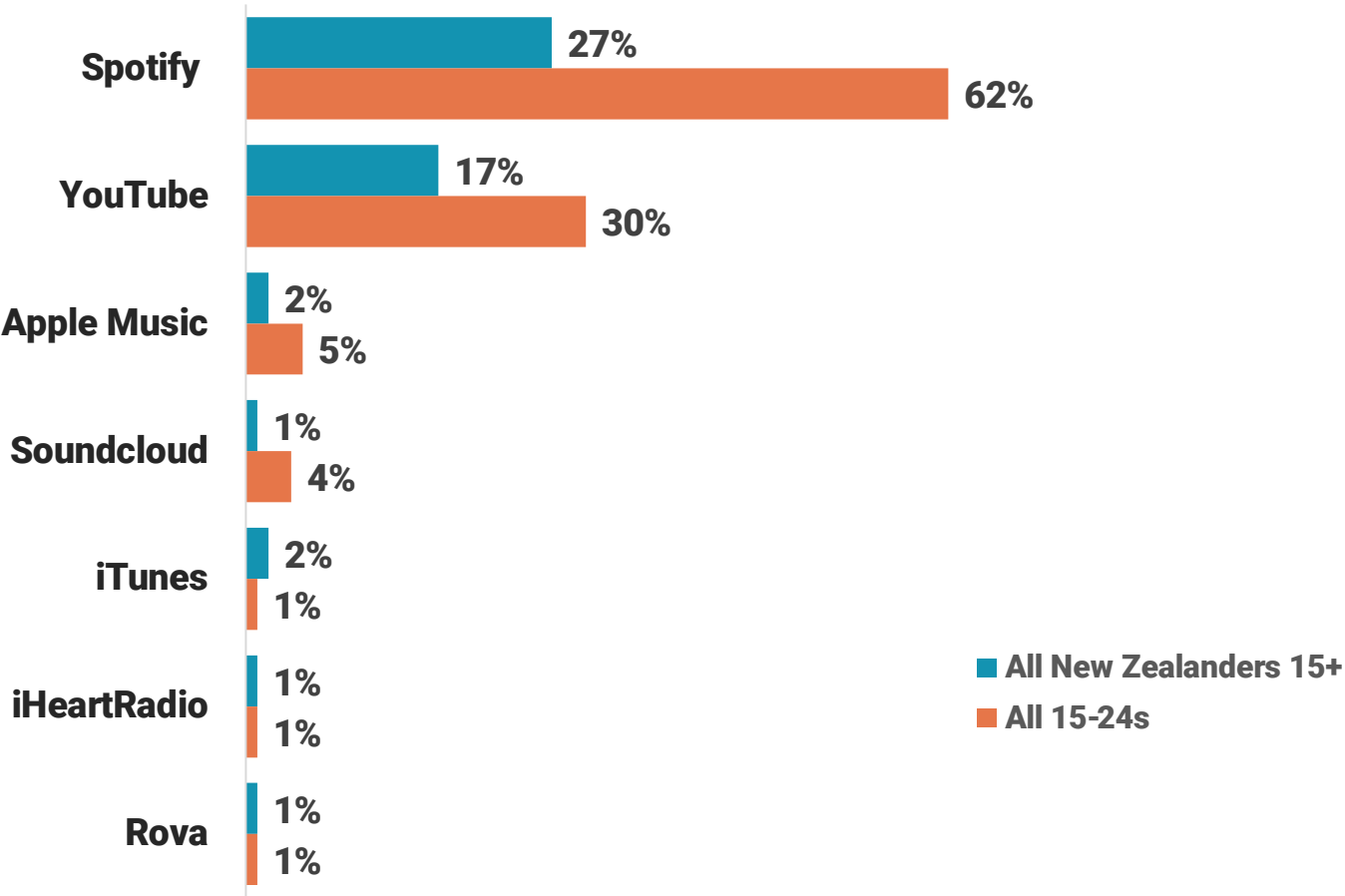
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



# 15-24s are more likely to use many of the main providers of music streaming than overall New Zealanders 15+, with Spotify easily the most popular over YouTube.

## Daily reach of music streaming sites 2021 – All New Zealanders 15+ & all 15-24s.

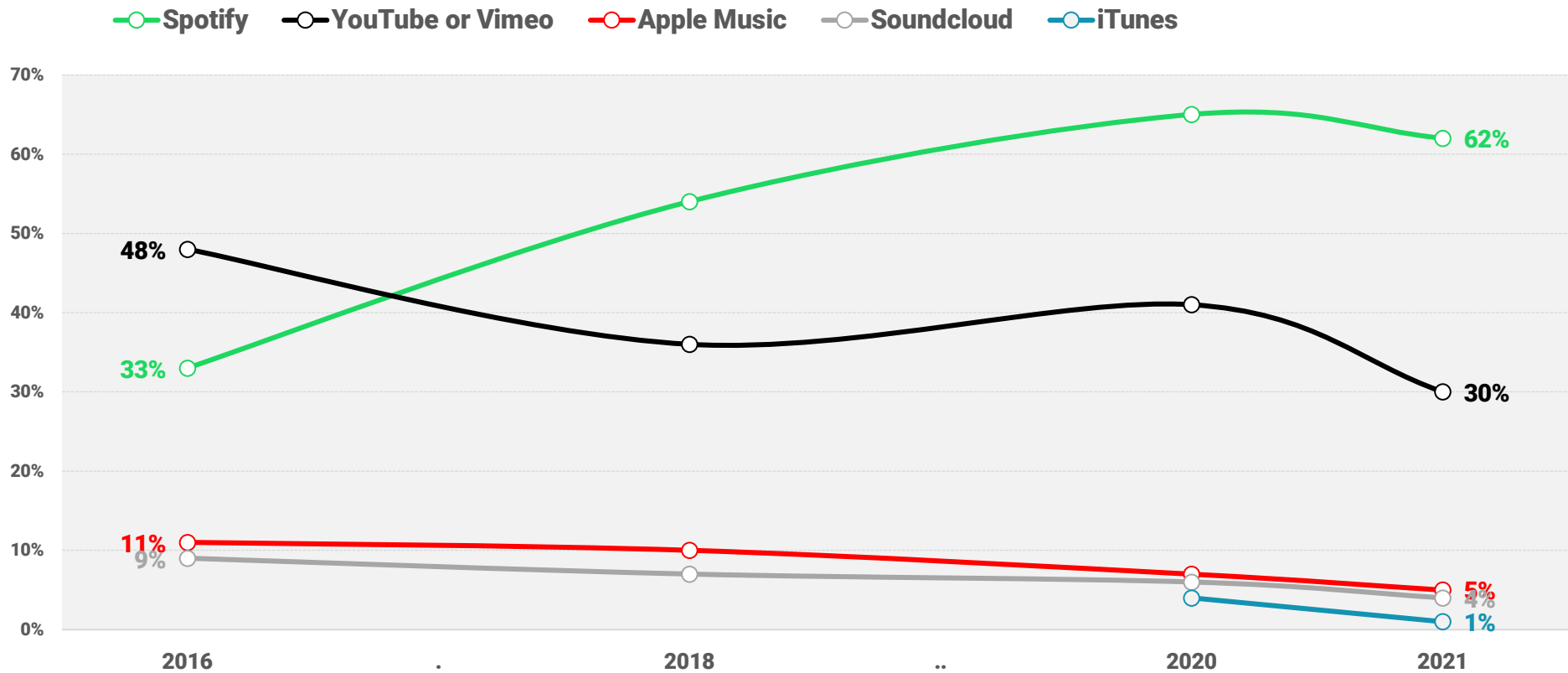
Q: Thinking about yesterday overall, which of the following websites did you use listen to music?



Spotify's audience among 15-24s is stable since 2020, but the audience listening to music via YouTube has declined significantly in 2021. Other music streaming sites have also declined slightly in the last 12 months.

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

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





# **Devices Personally Own Or Have Daily Access To**

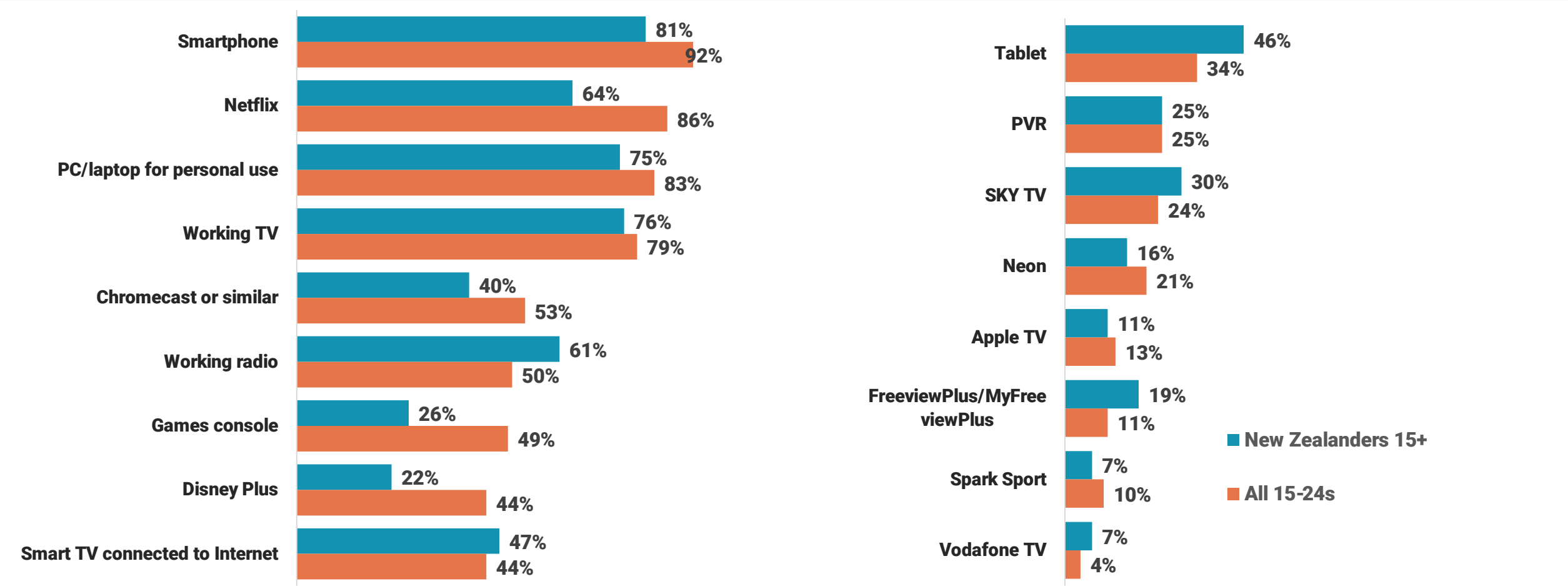




While 15-24s are just as likely to have access to a TV as overall New Zealanders 15+, they are significantly more likely to have access to the devices and services that enable use of digital media, and especially Netflix (86%), games console (49%), and Chromecast or similar (53%).

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

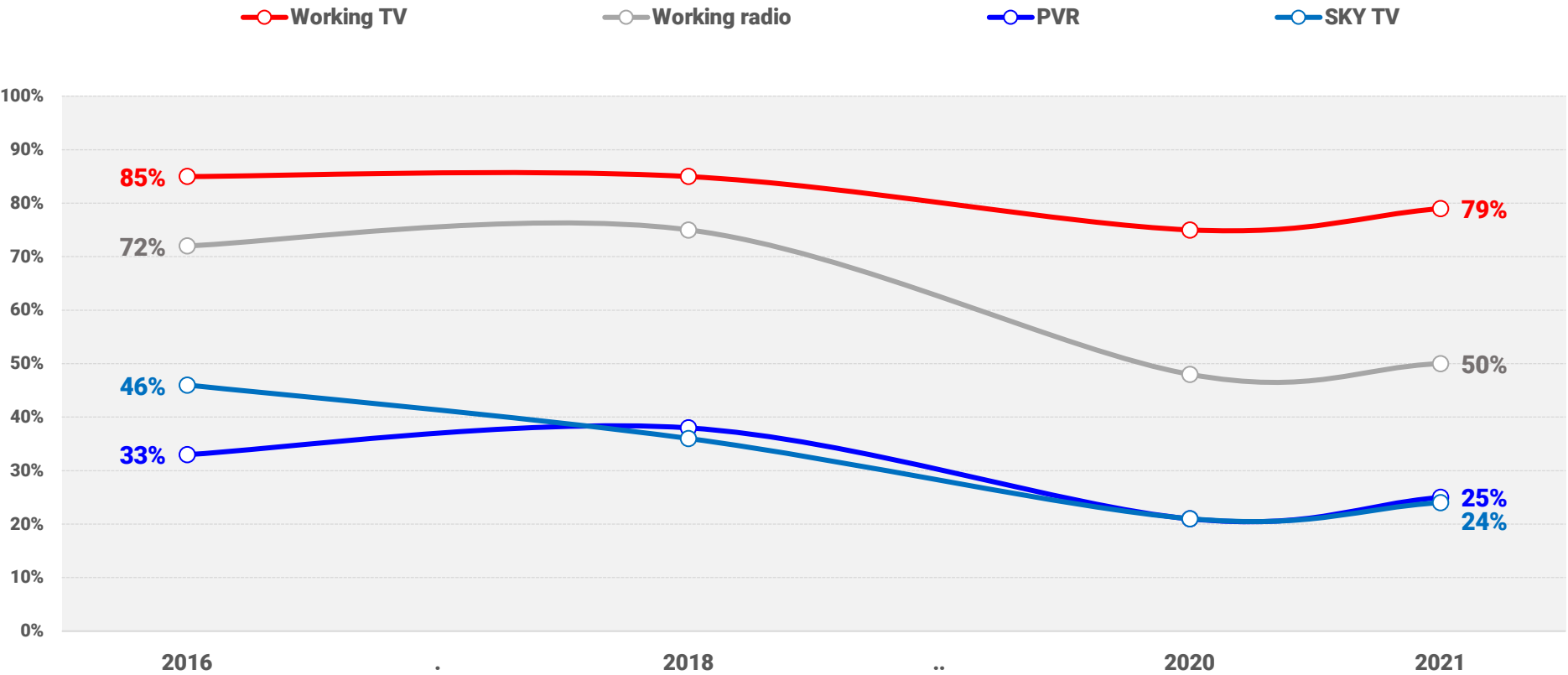
Q: Which of the following, if any, do you personally own or have daily access to?



The incidence of nearly all the devices and platforms that enable access to traditional media has been largely stable among 15-24s since 2020 and in fact each of the below show slight increases in 2021.

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

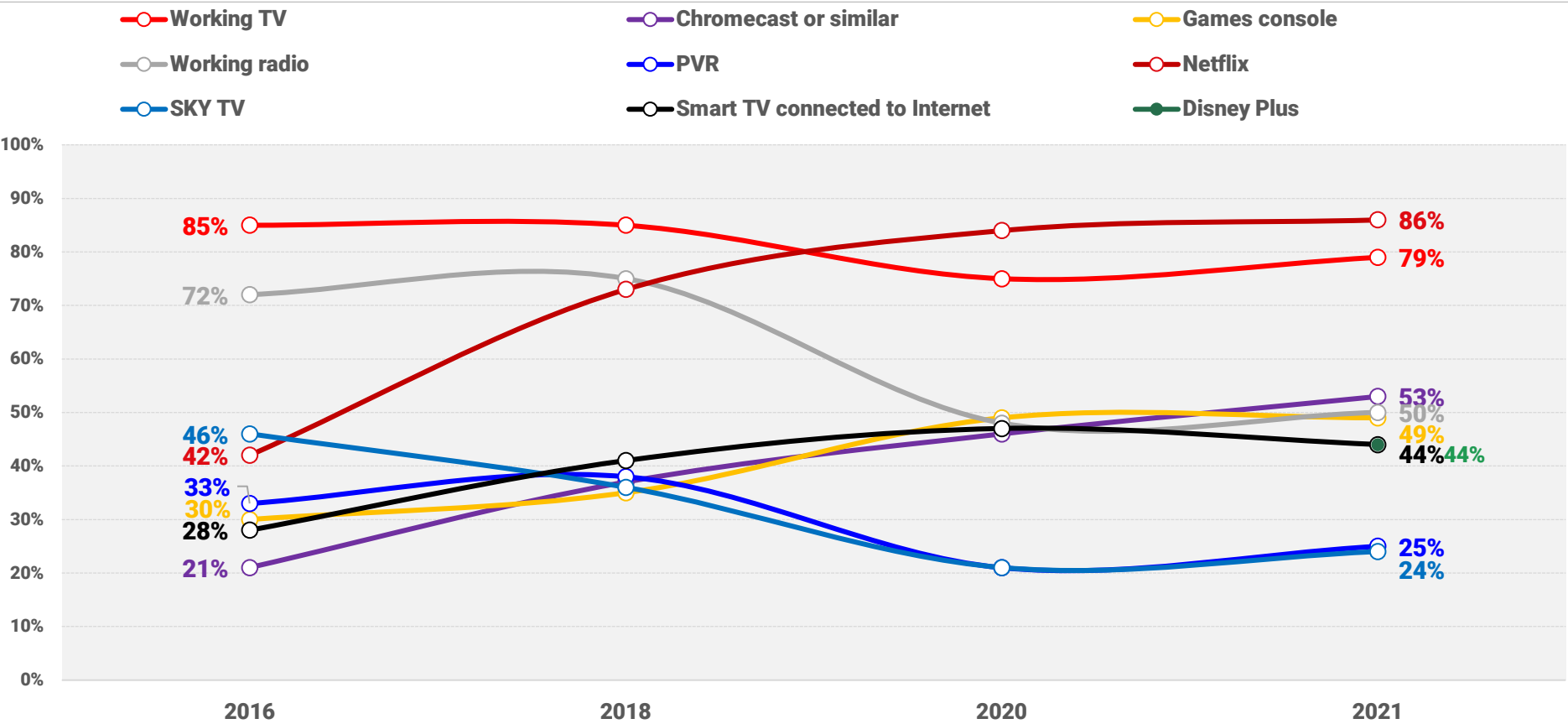
Q: Which of the following, if any, do you personally own or have daily access to?



The most common devices and platforms that enable access to digital media are also largely stable since 2020, except for a significant increase in the proportion of 15-24s who have access to Chromecast or similar.

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

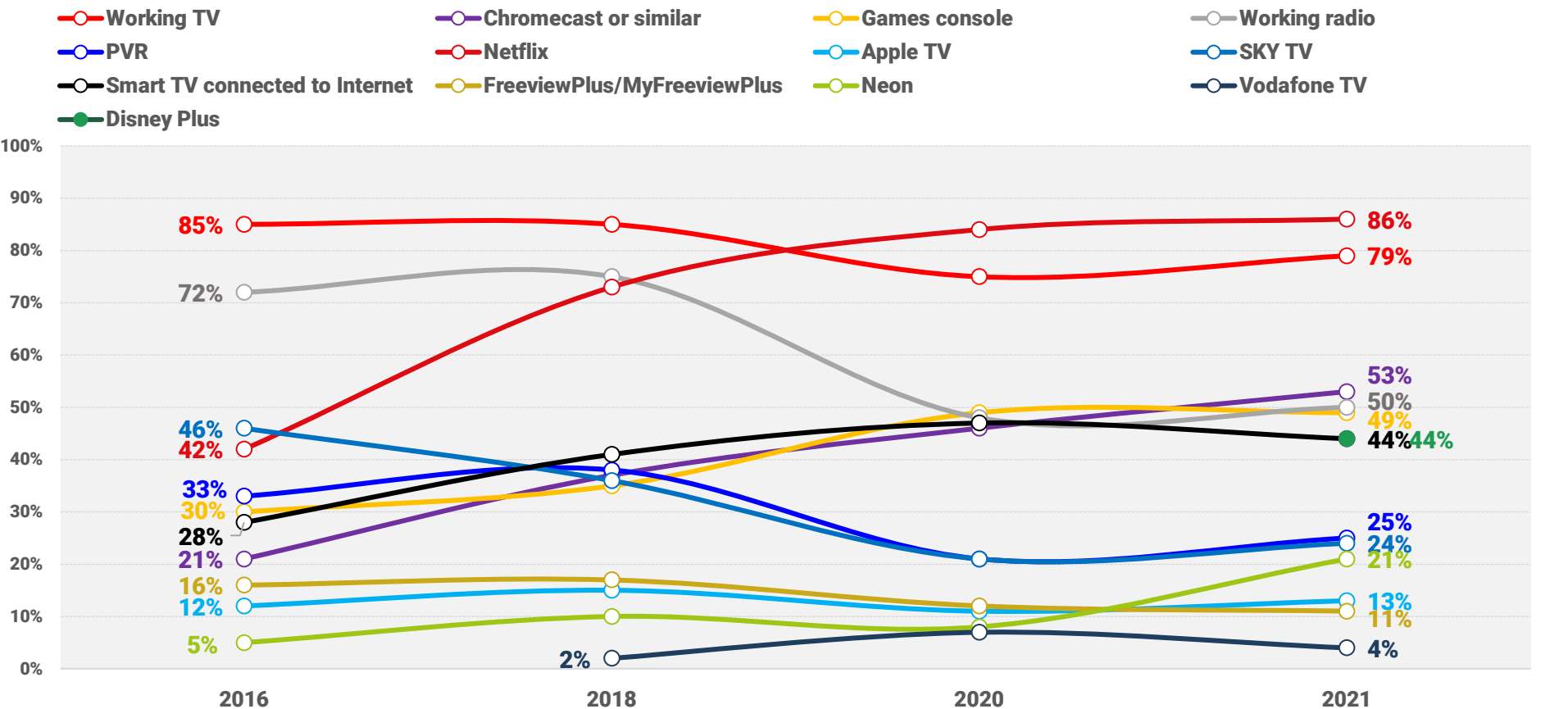
Q: Which of the following, if any, do you personally own or have daily access to?



With the exception of the increase in the audience watching Neon following the merger with Lightbox, the incidences of the remaining devices and platforms are also stable since 2020.

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

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

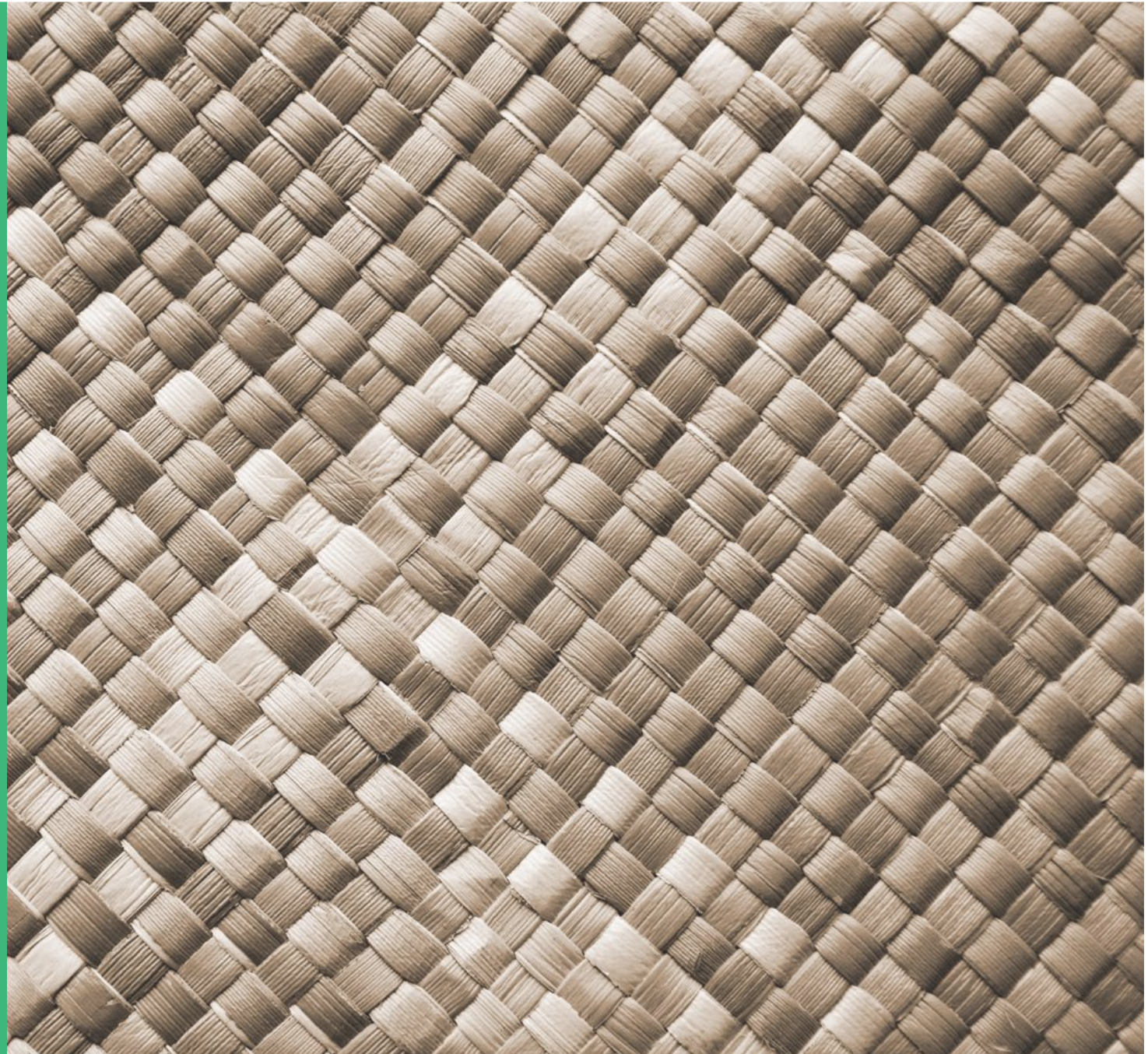


Note:  
Neon refers to the newly merged SVOD provider of Neon & Lightbox.





# Sources of news

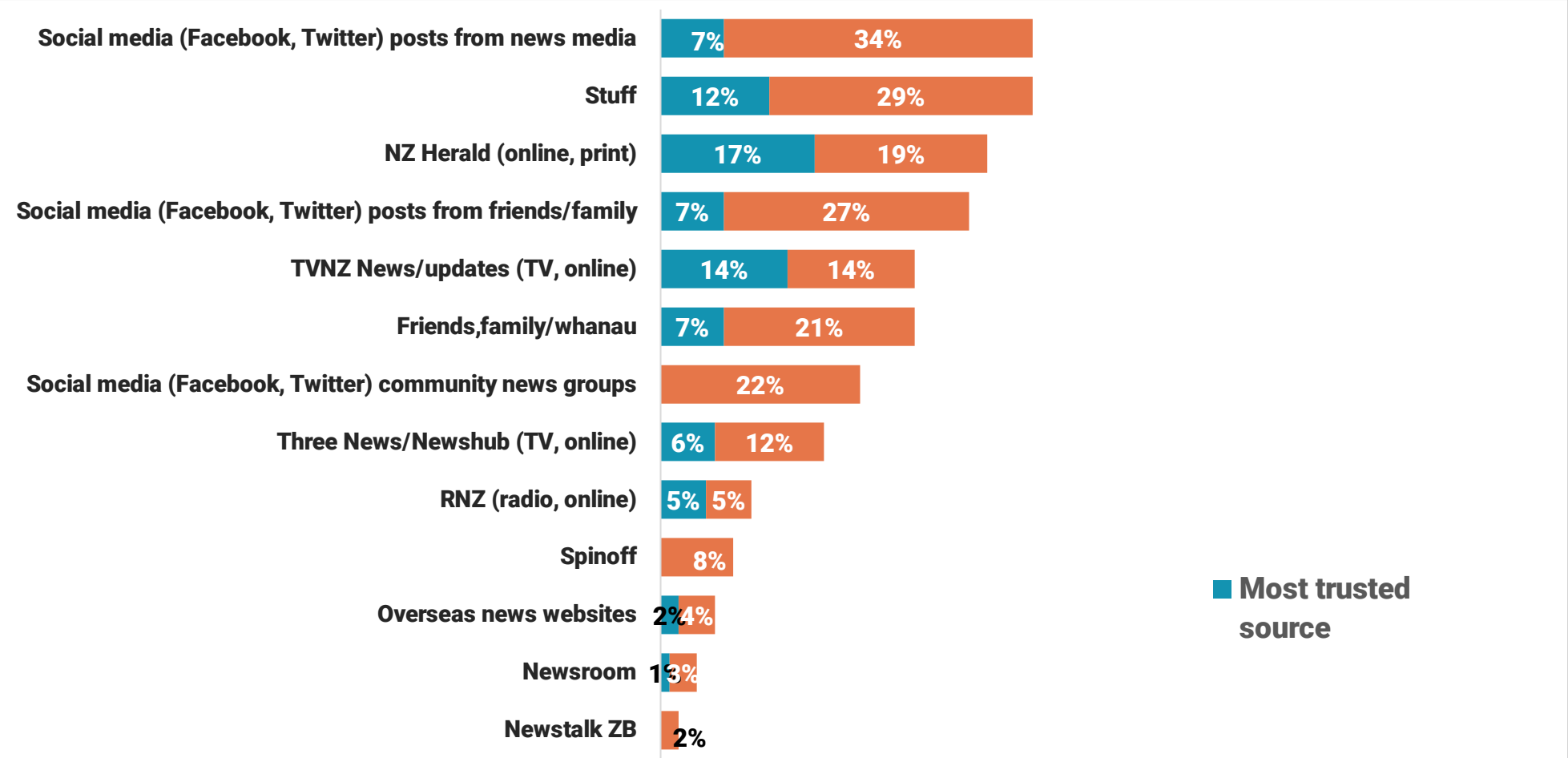




**Social media whether from friends and family, news media or community groups is the most widely used source of news among 15-24s, but fewer trust these sources most of all. Stuff and NZ Herald are equally widely used as social media and, along with TVNZ, are the most trusted sources of news among 15-24s.**

**Sources of news and information – all 15-24s.**

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





# WHERE ARE THE **AUDIENCES?**

**Youth (15-24s) report**

**AUGUST 2021**