

Understanding NZ Youth and Media in 2022

IRIRANGI TE MOTU | NZ ON AIR

THE BIG STRATEGIC QUESTION:

How to re-engage youth with local content

So NZ On Air and partners can:

build opportunities to better reach and support content on the platforms young people use.

To ensure:

New Zealand content remains a big part of young peoples' lives

And sustains:

a local content industry for generations to come.



THE RESEARCH OBJECTIVES

THE CORE BUSINESS OBJECTIVE:

Engage a youth audience through the right content that is relevant and reflects Aotearoa

THE SPECIFIC INSIGHT OBJECTIVES:

- 1 Understand the content discovery journey, including key influences.**
- 2 Determine the motivations** when it comes to content, including youth needs, preferences and any gaps.
- 3 Understand the role local content plays in the lives of Kiwi youth, including perceptions, barriers, motivators and key occasions.**
- 4 Identify key differences** between age stages.
- 5 Explore what quality content looks like** to New Zealand youth.
- 6 Understand if the barriers to local content are a perception or reality issue.**
- 7 Determine how to reengage the youth audience, including an idea of how to prioritise funding and creation of local content.**

A mixed-method and multi-stage methodology

ACROSS THE SAMPLE:

- Ethnic representation
- A mix of household income
- A mix of region – both urban and rural
- Disabled representation
- Rainbow community representation

STAGE 1A 3-WEEK ONLINE ETHNOGRAPHY

3-week online board to explore youth's complex media habits and perspectives.

- 10 x 15-17s
- 10 x 18-20s
- 10 x 21-24s

STAGE 1B ONGOING WHATSAPP GROUP CHAT

Answering 2-3 questions per week over the course of 3 weeks to capture on the spot behaviours.

STAGE 2A VIDEO ETHNOGRAPHY

A series of video tasks with 12 participants from stage 1A & 1B to further explore quality and perceptions of local content.

- 4 x 15-17s
- 4 x 18-20s
- 4 x 21-24s

STAGE 2B DEPTH INTERVIEWS

6 x 30-minute indepth interviews with participants from previous stages to dig deeper into their thoughts and experiences.

- 2 x 15-17s
- 3 x 18-20s
- 1 x 21-24s

Agenda

1

Understanding
the media
landscape
for youth

2

Identifying
youth content
drivers

3

Exploring
perceptions
of global vs.
local content

4

Understanding
what
determines
quality
content for
youth

5

Defining
the way
forward for
local content



Understanding the media landscape for youth

TRA

For youth, the issue around choice paralysis has been solved

Three key ways youth are discovering content:

TRUST THY ALGORITHM

Youth have grown up with and trust algorithms.

- Algorithms are getting smarter and smarter.
- They have an in-depth understanding of their preferences, they rarely fail to disappoint and are a great way to shortcut decision making.

INTEREST IS PIQUED THROUGH SOCIAL MEDIA

Youth use snippets of content on social media to help determine if something is worth their time.

- It's a good way to get a sense of the content and hear about other people's opinions on it, providing additional mental shortcuts.
- Helps youth figure out if the content suits their preferences.

WORD OF MOUTH HOLDS THE HIGHEST CURRENCY

People in their inner circle are a trusted source of recommendations.

- This happens through both in-person conversations and through social media.
- Suggestions from this reference group allows them to form deeper connections.

As a result, youth aren't going out of their way to discover new content

“ My favourite music genre is the TikTok algorithm because if I hear a song I like, I will download it to my playlist. I don't go searching for new songs often, so this is how most of them get onto my playlist.”

15-17-YEAR-OLD

IMPLICATION

To enhance perceptions of local content, we need to meet our audience where they are – on the platforms they already use. This means working with the parameters of algorithms to facilitate content engagement.

Most common
platforms mentioned:



Less mentioned
platforms:

**TRADITIONAL
TV & RADIO**

Platform preferences highlight key differences between the needs and expectations of youth and the general population

NEEDS AMONG YOUTH THAT ARE DISTINCT OR HAVE A MUCH GREATER EMPHASIS:

MORE BITE SIZED BURSTS

- Short, often endless bursts of enjoyment
- Used for filling time and often while multi-tasking (watching content on laptop, exercising etc)
- A key reason for increased YouTube and social media watching among youth

EXPECT INFINITE OPTIONS

- Highlights rising expectations driven by this generation
- Content needs to meet a range of needs – from pure entertainment and enjoyment to learning and upskilling

A DIFFERENT KIND OF SHARED EXPERIENCE

- Growing up online has led to meeting the need for social connection through less traditional approaches
- Staying up to date with what friends and public accounts are doing through feed posts, stories, reels
- Social engagement – linking, sharing and discussing content with friends

IMPLICATION

Local content needs to follow the new rules of engagement

1. Infiltrate algorithms on platforms available in New Zealand
2. Enable buzz and talkability that will drive social currency
3. Be digestible and bite sized, either as content itself or a teaser to initiate more involved watching

Identifying youth content drivers

2

TRA

Youth have unique content drivers which may not be met by local mainstream media

NEEDS THAT ARE MORE SPECIFIC TO YOUTH THAN THE GENERAL POPULATION INCLUDE:



MORE SELF IMPROVEMENT

Youth have grown up with information at their fingertips and are constantly on the lookout for less traditional ways to learn.

- Looking for content that informs in a relatable and digestible way.
- Must perfectly balance information and entertainment.
- Could directly relate to their hobbies and passions, raise awareness of social issues or help youth understand the world from a different perspective.



MORE APPRECIATION FOR CONTENT PRODUCTION

With many youth becoming content creators at an early age, they've got a closer understanding of what it takes to make 'stuff.'

- They're discerning and are paying attention to the effort and talent that goes into creating content.
- Character development, narrative arcs, lyrics and other technical elements are top of mind.
- If impressed, they're more likely to dedicate undivided attention.



NEED TO FEEL REPRESENTED & UNDERSTOOD

Youth reject cookie cutter approaches to life and have a greater appreciation for diversity in all regards.

- Sense of reality is key – they're looking for relatable content that reflects the realities of society today and celebrates individuality, rather than perpetuating stereotypes.
- This helps them feel a sense of belonging and identity.

Youth are currently looking to international platforms to satisfy these distinct needs

However, youth also share drivers with the general population which can't be forgotten

NEEDS THAT ARE RELEVANT TO BOTH YOUTH AND THE GENERAL POPULATION INCLUDE:



ESCAPISM

A gripping and unpredictable storyline immerses youth in another person's world, helping them to escape the mundanity or the worries of their lives.

When paired with high quality production youth are more likely to dedicate undivided attention and/or binge-watch.



RELAX & UNWIND

Something easy and light-hearted to watch helps youth momentarily 'check out' and de-stress.

Looking for something familiar to consume that doesn't require much mental energy (both when deciding and consuming).



MOOD BOOSTER

Particularly relevant for music, but also some short-form content (TikTok and Instagram reels).

In this mode, it's all about feel-good stuff that gets them hyped up, energised or inspired.



SOCIAL CURRENCY

Staying in the know about popular content and engaging in conversations about it is a key driver of engagement.

Talkability and hype are powerful drivers. Youth feel like they are missing out if they're unable to discuss content with their reference groups.

Focusing on youth specific drivers helps increase openness to a particular platform

Youth need to feel content platforms have content that has been tailored to them.



**MORE SELF-
IMPROVEMENT**
(YOUTH-SPECIFIC)

**MORE
APPRECIATION
FOR CONTENT
PRODUCTION**
(YOUTH-SPECIFIC)

**NEED TO FEEL
REPRESENTED
& UNDERSTOOD**
(YOUTH-SPECIFIC)

**SOCIAL
CURRENCY**
(RELEVANT TO
YOUTH & GENERAL
POPULATION)

Without these specific drivers, youth perceive platforms to be lacking variety and relevance.

IMPLICATION

“ I enjoy Andrew Huberman videos because he has a lot of wisdom to share and has discussions with other people with more to share about many topics that aim to better yourself through improving many things like dopamine, sleep, focus, motivation, athletic performance, gut health etc. ”

21-24-YEAR-OLD

But from a behaviour perspective, content needs aren't that different from general population

These motivations often drive binge-watching:



ESCAPISM

+



RELAX
& UNWIND

+



MOOD
BOOSTER

+



SOCIAL
CURRENCY

The biggest drivers of behaviour need to be acknowledged when creating content that youth will watch.

IMPLICATION

“ I find it difficult to pay attention to long things, so unless the show is super captivating, I will be talking to someone while watching or playing an iPad game so that my fingers have things to do.”

18–20-YEAR-OLD

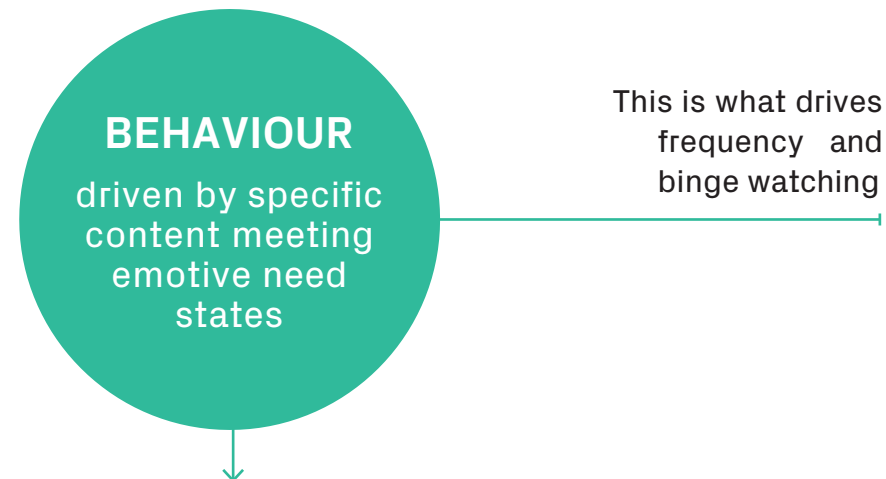
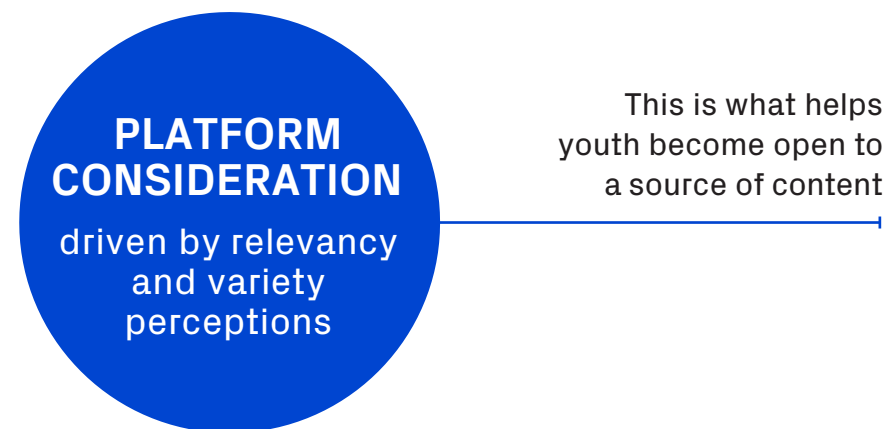
“ Joining in on discussions with friends provides a sense of community... having watched some of the same content gives another form of connection with my friends.”

15–17-YEAR-OLD

TRA

IN SUMMARY

There are two important areas that drive positivity to content



These are not necessarily unique to youth but will work harder if expressed or in a youth focussed way (or feel targeted at youth)

3

Exploring
perceptions of
global vs. local
content

TRA

Global content has set the bar incredibly high

Youth are assessing local and global content through the same lens.

There aren't separate criteria for what makes local content worthwhile vs. global content. For youth, they are one and the same.

Youth have grown up in a hyperconnected world unconstrained by physical proximity. Their choices are driven by personal preferences, core needs and accessibility, not where the content came from.

This means they're less forgiving about the perceived shortcomings of local content when it's compared to global content.

In a world of choice and speed, connecting with local content takes time and energy.

IMPLICATION

“ I find locally made content incredibly cheesy and often cheap, especially when it comes to reality TV shows. When this is combined with tall poppy syndrome, you get uninteresting shows full of uninteresting characters.”

18–20-YEAR-OLD

TRA

Local content platforms feel less relevant to youth

LOCAL CONTENT PLATFORMS

The most well-known NZ platforms feel more tailored to older demographics

W H A K A A T A
M Ā Ō R I

+H R E

RNZ
NATIONAL

Prime

tvnz

GLOBAL CONTENT PLATFORMS

The major international platforms feel much more inclusive of youth

YouTube

NETFLIX

prime

Disney+

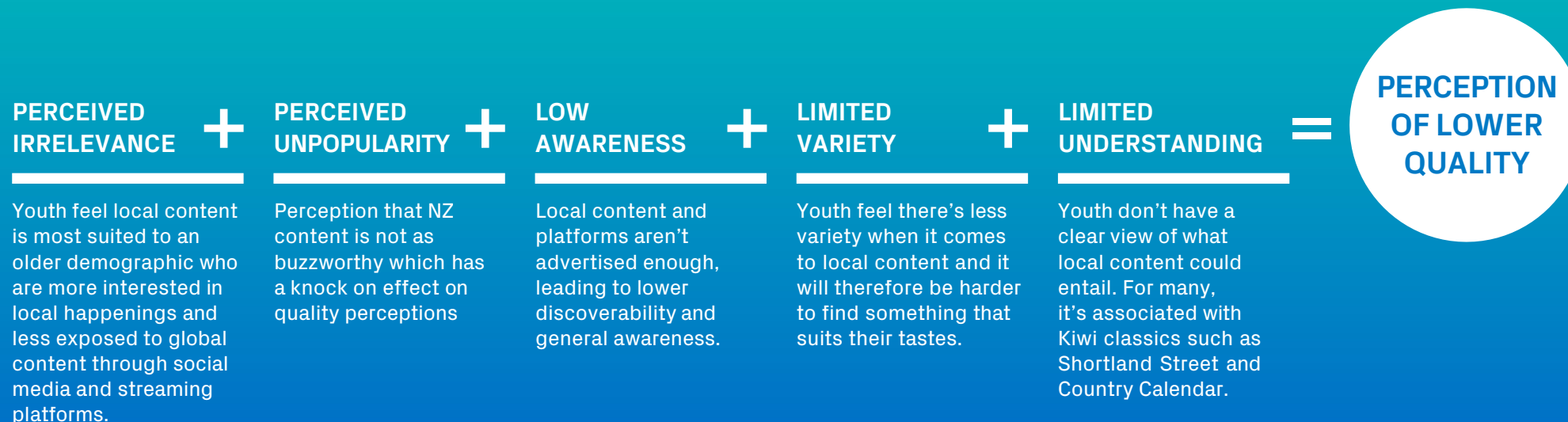
There is clearly a need to reposition the centre of gravity of both local content and local content platforms to feel more relevant to youth.

IMPLICATION

“ If local content disappeared, I wouldn’t really be upset. I do not consume much local content and often find it quite irritating and cheesy...I’m sure there would be a lot of Kiwis who would feel pretty upset about losing this content as they have quite an attachment to it. A lot of older generations are exposed to mostly local content as that is what airs on TV so it would leave a big gap for them.”

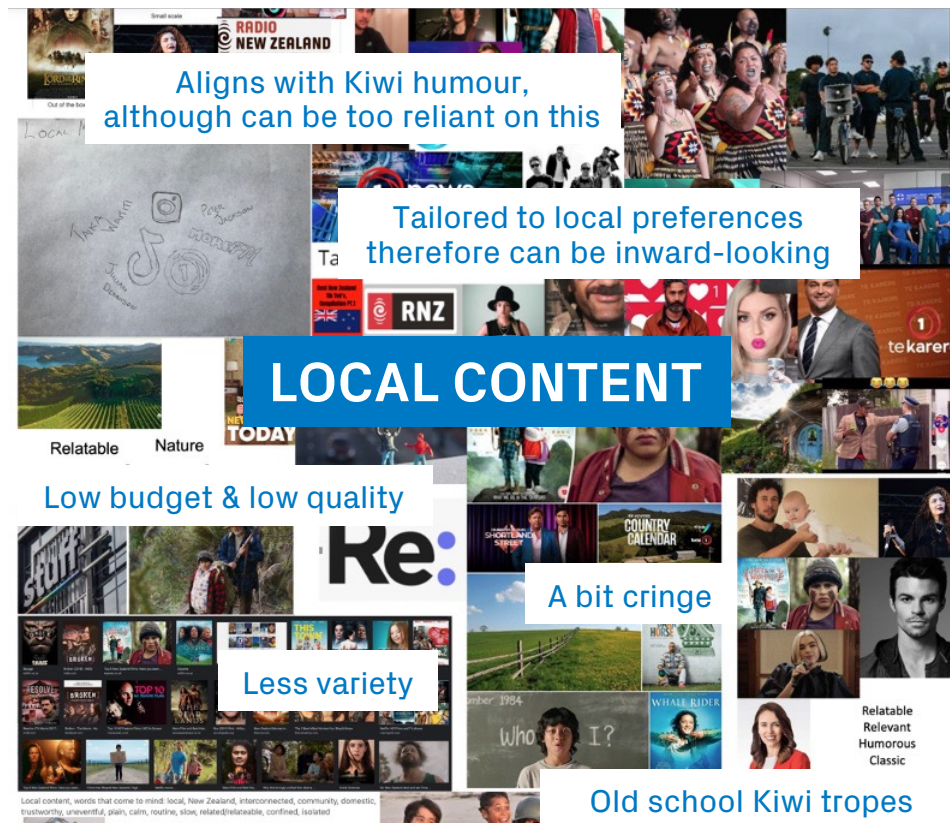
18-20-YEAR-OLD

Local content faces significant barriers to engagement due to its perceived lower quality

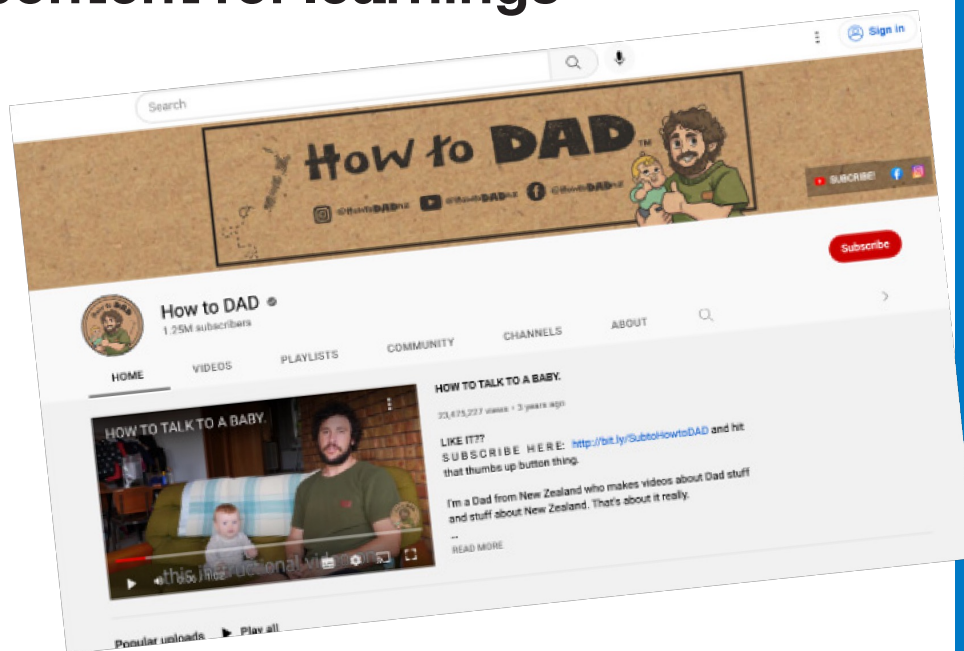


With all these barriers at play, it's currently much easier for youth to stick to tried and true global media

As a result, global content feels inherently more interesting to youth



‘How to Dad’ resonated well with youth – we can look to this content for learnings



THIS EXAMPLE CAME UP MULTIPLE TIMES SPONTANEOUSLY IN OUR RESEARCH. IT'S EFFECTIVE AS IT MEETS MULTIPLE NEEDS AMONG NZ YOUTH...

- It's on a well-known platform (YouTube)
- Short clips – help feed into the desire for bite sized content
- NZ humour – is unique to NZ content
- Real, authentic and unfiltered – due to its raw, unscripted format
- Inclusive of a variety of struggles – allowing it to relate to every day people and every day lives
- Buzz worthy/large following – as it delivers to the wider emotive needs of gen pop

IMPLICATION

Local content needs to shift its centre of gravity to become more inclusive of youth

Platforms like TVNZ+, Three Now, Whakaata Māori and RNZ either need to shift their centre of gravity as a collective to become more inclusive of youth

OR

More funding is needed to create or promote new content platforms that are more dedicated to youth

Understanding what
determines quality
content for youth

4

TRA

Youth are looking for shortcuts to identify high quality content

HOW THE CONTENT IS PRESENTED TO ITS INTENDED AUDIENCE IS IMPORTANT – THUMBNAIL, SYNOPSIS, TRAILER, TEASERS AND OTHER SURROUNDING ADVERTISING.

WHY?

- If effort has gone into material surrounding the content they think it's more likely to be high quality.
- Growing up on social media means this age group is highly visual.
- In a world of overwhelming choice, the thumbnail needs to work even harder.



IMPLICATION

It will be key to focus on the visual elements surrounding local content – eye-catching thumbnails and intriguing synopses, teasers and trailers.

TALKABILITY AND SOCIAL HYPE PLAY A KEY ROLE IN CUEING QUALITY CONTENT.



WHY?

- Belief that if they've heard about a show before, it's for a good reason and likely to be worth their time.
- If something hasn't made it into their echo chamber, they're wary to branch out.

IMPLICATION

We need to work with the algorithm and generate momentum on social media platforms to raise the profile of local content.

We know that content production is important to youth – this can be broken down into three components that combine to cue quality



Youth are more tuned in to the technical elements that make up a show or movie.

They're looking for impressive cinematography, audio, VFX, editing, set and costume design, lighting, colour etc to feel immersed in a show.

KNOWING THE AMPLIFIED IMPORTANCE OF CONTENT PRODUCTION, WE SHOULD CONSIDER INVESTING MORE INTO FEWER PIECES OF CONTENT TO SHIFT THE DIAL.

High quality storylines are just as important to youth as they are to the general population. However, for NZ content there is a gap for more creative stories.

Youth are interested in more unpredictable dramas, thrillers, romances and true crime content that gets them thinking and keeps them wanting more.

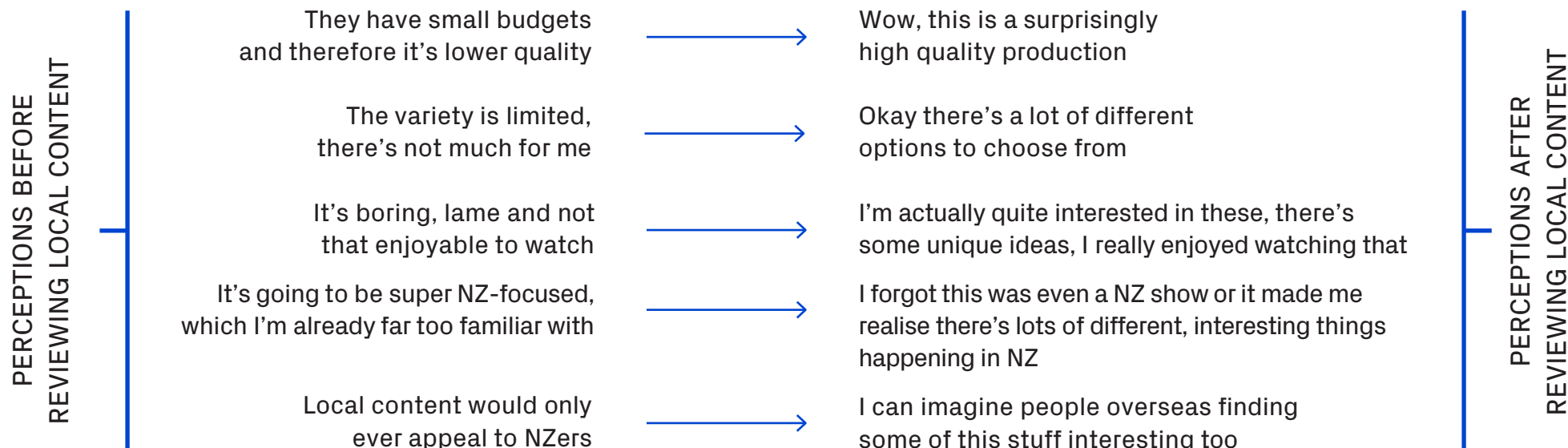
WE SHOULD CONSIDER BRANCHING OUT INTO HIGH QUALITY FICTION CONTENT TO FILL THIS GAP.

Plays into youth's quest to learn about the diverse range of people that make up society.

Youth want to connect, and sometimes identify, with characters on-screen by understanding their emotions, perspectives and struggles.

FOCUSING ON DEVELOPING A DIVERSE RANGE OF CHARACTERS WILL HELP INCREASE THE RELEVANCY OF LOCAL CONTENT.

We saw multiple shifts in youth's view of local content, indicating this is a perception, rather than a reality, issue



IMPLICATION

Awareness is a huge barrier. Local content needs to establish a presence on platforms youth already use to begin redefining perceptions.

2000s Baby and New Zealand Today were highlighted as good examples of local content

2000S BABY

- Eye-catching thumbnail and intriguing synopsis
- Slick, professional production
- Celebrated diversity and a range of viewpoints

“ 2000s Baby really surprised me, it was enjoyable to watch, had high production quality and felt professional.”

15–17-YEAR-OLD



Documentary

2000s Baby

You're invited to Misha, Rāwhiti, Poe Tiare, Alison and Tristan's 21sts, getting a snapshot of what it looks like to become an adult across different walks of life in Aotearoa.

NEW ZEALAND TODAY

- Genuinely funny and relatable – unscripted comedy works best
- High quality production
- Guy Williams acted as an endorser
- Prior knowledge of content via algorithms
- Used humour to address important topics (e.g. pronunciation of Māori words)

“ It honestly exceeded my expectations, I expected it to just be funny interviews with people, not talking about anything serious. But I liked the way they tackled a contemporary problem in a very relaxed way. I'd definitely watch it again.”

18–20-YEAR-OLD



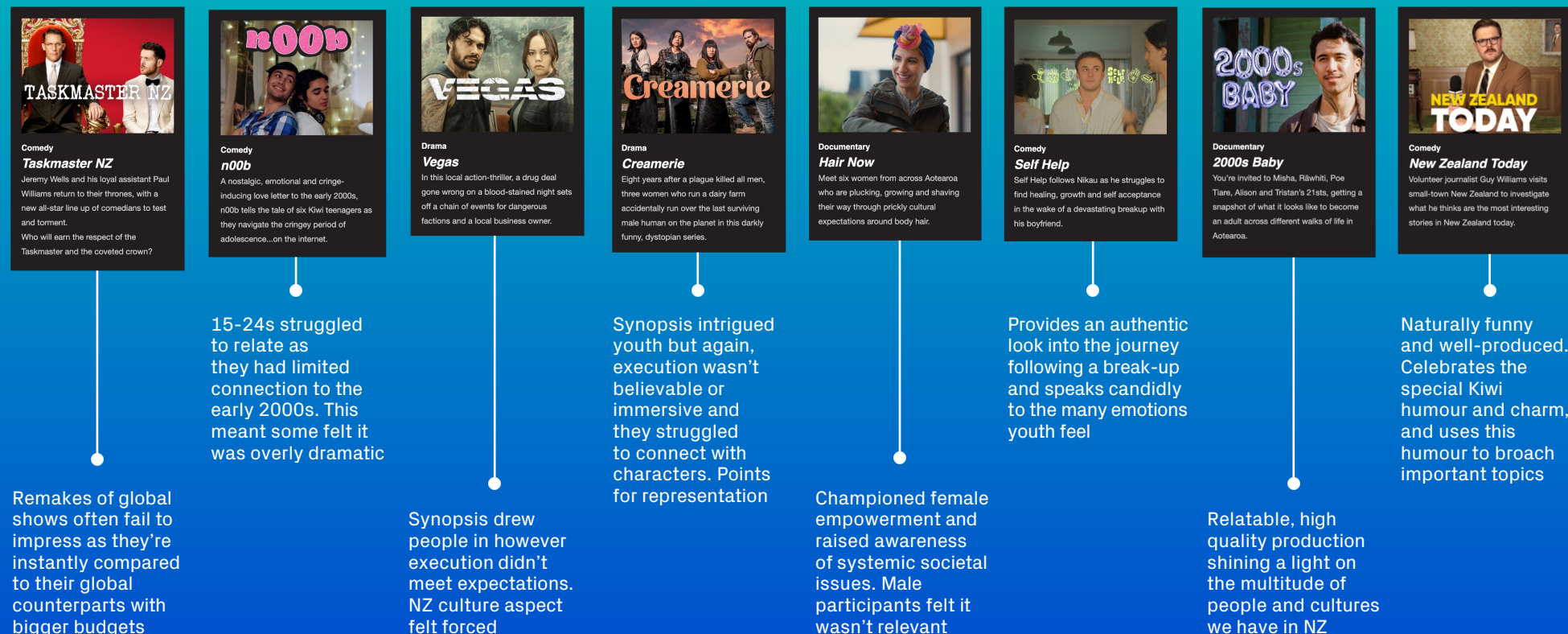
Comedy

New Zealand Today

Volunteer journalist Guy Williams visits small-town New Zealand to investigate what he thinks are the most interesting stories in New Zealand today.

Based on the content examples our youth audience reviewed, we have identified an indicative spectrum of relevancy

← LESS RELEVANT TO YOUTH MORE RELEVANT TO YOUTH →



IMPLICATION

**We are not starting from scratch
– the local content we are already
producing is on the right track.**

There is an opportunity to strengthen this, but a key focus should also be on raising awareness of local content.

This means establishing a presence on the platforms youth already use to drive engagement.

5

Exploring the way
forward for local content

TRA

A recap on the key learnings

1

Local content needs to follow the new rules of engagement

2

Platform consideration is driven by youth-specific relevancy and variety perceptions. Behaviour is driven by specific content meeting emotive need states that youth share with the general population.

3

Local content needs to shift its centre of gravity to become more inclusive of youth

4

Barriers to local content are mostly a perception, rather than a reality, issue

5

There is a huge opportunity to raise awareness of local content by infiltrating the algorithms on platforms youth already use

We need to start evolving perceptions of local content

FROM

- ‘Homemade’
- Lowbrow & reliant on Kiwi tropes
- Boring & predictable
- Inward-focused

TO

- Creative & professional
- Representative of modern NZ
- Variety & depth
- Putting NZ on the world stage

“ If they made a show that authentically captured New Zealand and lots of overseas people were watching I think that would be so cool, I’d feel quite proud. It would be cool to see the world be a bit more aware of New Zealand.”

18-20-YEAR-OLD

To increase relevancy of local content amongst youth, we should consider focusing on the following areas

YOUTH HAVE STATED THEY'RE INTERESTED TO SEE MORE:

MODERN NZ HUMOUR

We should build on our comedic roots, but making sure our humour is 'of today' will be key.

- Seeing our humour represented on screen is a special experience for youth.
- There's an opportunity to ensure it's more inclusive of new New Zealand.
- It can be used to broach important topics.
- Becomes cringe when it feels forced or scripted.

KIWI LIFE & CULTURE

Youth want to learn about and connect with the country they call home.

- Celebrate the different people, lifestyles and cultures within NZ.
- Seeing themselves represented on-screen would help youth feel more connected to, and proud of, their country.

FICTION CONTENT

Celebrate the creativity that exists within NZ through more interesting stories.

- Youth want to see engaging dramas, romances, thrillers and horrors.
- They believe local content tends to lean towards comedy, documentaries or reality TV and would like things to branch out.

RAISING AWARENESS OF SOCIAL ISSUES

Youth are seeking self-acceptance and belonging through better representation on-screen.

- They want to see important topics such as mental health, racism, LGBTQ+ rights, sexism etc represented in mainstream media to paint a more realistic picture of life today.

Thank you

TRA