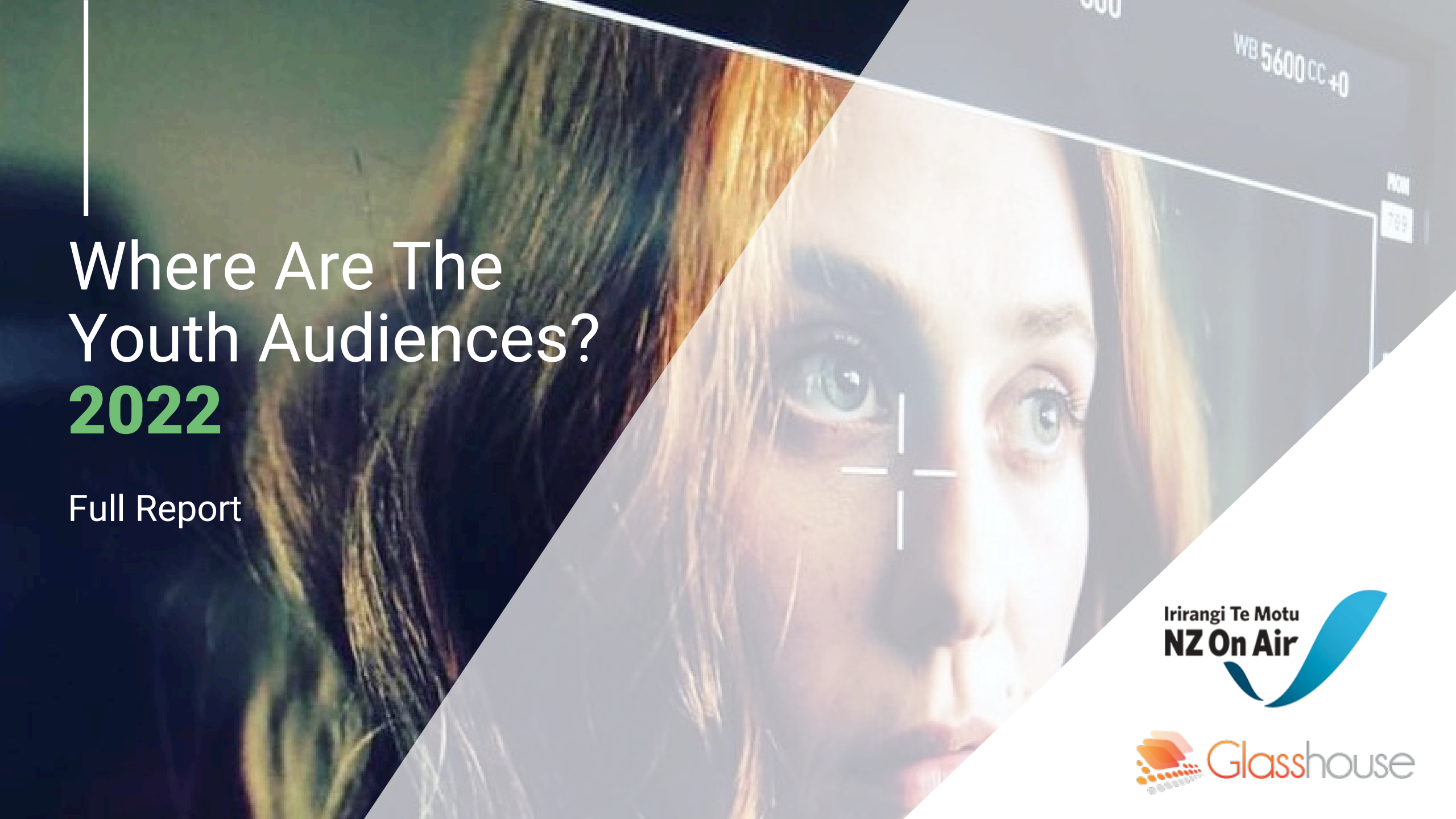
Where Are The Youth Audiences? 2022

Full Report



Irirangi Te Motu
NZ On Air

Glasshouse

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Background

New Zealand On Air (NZ On Air) supports and funds audio and visual public media content for New Zealand audiences, focussing on NZ stories and music that reflect New Zealand's cultural identity and help build social cohesion, inclusion and connection.

It is therefore essential this content reaches its intended audience and this requires NZ On Air to have a detailed and accurate understanding of the behaviour and evolving trends of all NZ audiences.

NZ On Air's Where Are The Audiences? study (WATA) has consistently shown the youth audience moving further and faster in to digital media than other audiences. These trends increase the difficulty for NZ On Air funded content and providers to reach this critical audience due to the fragmented nature of most digital media and the lack of NZ based content and producers on these platforms. These trends also impact NZ On Air's ability to reach Māori and Pasifika audiences given the very young profile of these population cohorts. This audience's current behaviour will also influence how much they engage with NZ content and providers as they get older.

NZ On Air have therefore commissioned a two phase research study to develop an in-depth understanding of NZ youth audiences' media behaviour, attitudes and content needs so as to better reengage New Zealand youth with local content.

Phase one consisted of qualitative research to understand how youth make decisions about what media content to engage with, why they enjoy some content more than others, and their perceptions of NZ content and providers compared to international or user generated content.

This report details the findings of phase two of the study - a quantitative study to measure current behaviour and the incidence and relative importance of the trends and themes identified in phase one.

Objectives

The objectives of this phase of the study are to measure daily youth audience behaviour and to quantify (ie. measure the incidence and relative importance) the trends and themes identified in the qualitative phase of the study.

Specifically the objectives of this phase of the study are to:

- Provide a high level, robust and single source measure of youth audience behaviour across all media and platforms. Specifically the study delivers accurate measures of;
  - Daily audience sizes – by media, channel/station/site
  - Profiles of youth audiences by media
  - Sources of discovering new content
  - Access to technology and platforms
- Incorporate daily social media use into measures of daily media consumption, including by site and profiles of audiences.
- Measure the incidence and relative influence of the attitudes and perceptions that drive choice of content, media types and providers – including NZ and international content and providers.
- Measure consumption of NZ made content, and the incidence and relative influence of attitudes and perceptions of NZ content that impact on behaviour.
- Determine what elements will best improve the appeal of NZ content among this audience.
- Provide a breakdown of behaviour and attitudes by key variables within the overall youth audience, including by age and ethnicity.

Research Approach

The difficulty in reaching youth audiences with NZ content is also reflected in the difficulty in encouraging this cohort to participate in research, and has resulted in a change in methodology from the standard WATA study.

Primary Approach – Mobile telephone interviewing

N=400 interviews were completed using telephone interviewing via mobile phones.

Due to the inefficiencies of random digit dialling to mobile phones, sample was derived from a range of list brokers such as Egentic which provide consumer lists with opt-in consent from a range of public sources such as competitions.

Secondary Approach – Online interviewing

Due to concerns about mobile interviewing alone providing sufficient 15-17 year olds, n=306 interviews were also completed using online interviewing via two consumer research panels – Dynata and Kantar.

Sample Composition/Respondent Definition

A total of n=706 interviews were completed, resulting in a maximum margin for error of +/-3.7% at a 95% confidence interval.

Respondents were defined as all New Zealanders aged 15-24.

Regional sample stratification, and minimum quotas for males, 15-17 year olds and ethnic groups were implemented to ensure a robust nationwide sample was developed.

The total sample has been post-weighted by age, gender and ethnicity to ensure it is representative of the 15-24 NZ population.

Fieldwork

Interviewing was conducted between September 1st and October 6th by Infield International who are fully accredited under ISO 20252.

Comparability to the Where Are The Audiences? study

While measures of 15-24 year olds' daily media behaviour appear the same as in the standard WATA study, it is not possible to compare the results of this study to past WATA results among this audience.

There are three main reasons for this:

Different methodology:

The main WATA study uses an almost equal split of random digit dialling to landlines and online interviewing in homes without a landline as its methodology. A primary approach of interviewing via mobile phones based on list broker databases will deliver different outcomes in this study.

Different approach to measuring behaviour:

As per the WATA study, daily audience behaviour has been measured based on what respondents did yesterday, with robust and representative samples developed for each day of the week. However to ensure the interview was able to fully investigate the attitudes and perceptions of 15-24 year olds, respondents were asked about their media consumption between 6am to midnight yesterday in one time block overall, rather than breaking the day in to different time periods as per the WATA study.

Different media set:

For this study, social media was introduced to the media set in terms of what respondents consumed yesterday. While this behaviour was captured in a separate question to the rest of the media options, this data has been reported on the same charts to enable comparisons across all media.

Abbreviations Used in Report

Abbreviation	Media Type
TV Total	All (net) Linear TV viewing
Radio	Live NZ Radio
OS Online Video	International online Video e.g. YouTube, Facebook
NZ Online Video	NZ online video e.g. NZ Herald, Stuff
SVOD Total	All (net) SVOD
NZ SVOD	NZ sourced SVOD (e.g. Netflix, Neon)
OS SVOD	Overseas SVOD (e.g. Netflix via VPN, Hulu, BBC)
TV Pay	TV via pay TV platform (ie. SKY TV))
TV FTA	TV via free to air platform
Music	Music on physical formats and non-streaming (eg. iPod, CDs)
Music Stream	Music online/streamed (e.g. YouTube, Spotify)

Abbreviation	Media Type
Online Radio	Online NZ radio
Social Media	All social media incl. Facebook, Instagram, Twitter, TikTok, WeChat
NZ OD	NZ Ondemand sites
Newspaper	Newspaper reading (including online)
Magazine	Magazine reading (including online)
Online gaming	Played games online on a gaming console, PC/laptop, phone or tablet
Podcasts	Listen to podcasts
Music YT	Listen to music on YouTube
iHeartRadio	Listen to music on iHeartRadio

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01

Key Insights & Summary

Key Insights

- The NZ youth audience (15-24s) still enjoy and value NZ content. For instance most 15-24s;
  - Engage with NZ shows or music several times a week if not daily
  - Recognise the strengths of NZ content and its ability to deliver what they are looking for
  - Feel more proud to be a Kiwi when they see or hear NZ shows and music

- In addition all Kiwi cues appeal to most 15-24 year olds.

- However this audience have significantly fewer opportunities to watch, hear or just learn about NZ content, especially video content, due to their predominantly digital media consumption and their choices of sites, channels and stations.

- These choices are strongly influenced by the perceived strengths and weaknesses of different media types and providers, with NZ based options not comparing as favourably to overseas providers.

- While attitudes to NZ content and Kiwi cues are positive overall, some 15-24s hold less positive perceptions of NZ made content which will also be influencing their decisions of whether to prioritise NZ shows and music in the time they have available for entertainment and social media.

➢ **The key to increasing 15-24s' opportunities to engage with NZ content is to somehow break in to their bubble of word of mouth and algorithm based decision-making to let them know what they're missing and remind this audience of the best bits of NZ content.**

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Summary

Audience behaviour

- As has been identified in the standard WATA study in previous years, digital media attracts the biggest audiences among 15-24s each day by a significant margin.
  - Nine in ten 15-24s engage with social media each day
  - Eight in ten watch overseas online video or listen to streamed music
  - Nearly seven in ten watch SVOD
  - Four in ten play online gaming

- No more than three in ten 15-24s engage with radio, TV or ondemand each day
  - Three in ten listen to the radio or watch TV each day
  - One in four watch ondemand
  - 17% watch NZ online video

➢ **Most 15-24s engage with media that is delivered from outside New Zealand.**

➢ **These choices mean that significantly fewer 15-24s have opportunities to engage with NZ content.**

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Summary

Audience behaviour

- How 15-24s choose to allocate their entertainment and social media time mirrors audiences sizes with digital media taking the lions share of that time.
  - On average 15-24s spend almost two hours each day listening to streamed music or watching SVOD
  - More than an hour and a half is spent on social media or watching overseas online video
  - More than an hour is spent playing online games

- Comparatively less time is dedicated to media from NZ sources.
  - On average half an hour is spent listening to the radio or watching TV
  - 17 minutes is spent watching ondemand

➢ **There is a very large difference between the audience sizes and time spent on the most popular digital media and the NZ based media where most NZ content is found.**

➢ **Consequently there is little time each day when 15-24s have the opportunity to see learn about NZ content.**

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Summary

Audience behaviour

- Given the dominance of digital media overall it is not surprising to find the most popular sites, channels and stations among 15-24s are overseas providers.
  - Two thirds of 15-24s engage with YouTube, Facebook, Instagram and/or Spotify each day
  - Nearly six in ten watch Netflix
  - More than four in ten use TikTok and/or Snapchat

- The most popular NZ provider is TVNZ, reaching three in ten 15-24s each day, followed by Warner Bros/Discovery reaching 14% and SKY TV reaching 12%.

- The most popular NZ sites, channels or stations are;
  - TVNZ + (18% daily reach)
  - TVNZ 1 (15%)
  - TVNZ 2 (10%)
  - NZ Herald (10%)
  - Three (9%)
  - The Edge (9%)

Summary

Audience behaviour

- On more positive notes for NZ content, levels of engagement with NZ based media are high among those 15-24s who do use them each day.
  - On average TV viewers watch for nearly two hours each day
  - Radio listeners listen for more than an hour and a half
  - Ondemand viewers watch for more than an hour
  - NZ online video viewers watch for 45 minutes

- There is also evidence of a subgroup of 15-24s who are more likely to engage with all sources of NZ based media each day.
  - Those who listen to the radio, watch TV or watch ondemand are also more likely to use the other NZ based media in this grouping.

➢ **There is evidence of a cohort of 15-24s who are more engaged with NZ based media, and are therefore more likely to be exposed to or consume NZ content.**

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Summary

Consumption of NZ content

- 15-24s are more likely to have listened to NZ music recently than watched a NZ made show.
  - Three in ten listened to NZ music yesterday
  - Another one in three have done so at least once in the last week

- Viewing of a NZ made show is lower but still reaches a significant minority of 15-24s each week, reflecting the subgroup who are more likely to be exposed to NZ content.
  - 16% watched a NZ made show yesterday
  - Another 18% have done so at least once in the last week.

➢ **Despite audience behaviour that will result in fewer opportunities to see, hear or learn about NZ content, significant numbers of 15-24s are listening to NZ music and/or watching NZ made shows each day, or at least once a week.**

Summary

Motivations to consume content

- In terms of what motivates viewing choices, most 15-24s say they make active choices rather than accept what is most easily available.

- Based on what they watched yesterday the most common motivations are:
  - Eight in ten wanted to watch something of good quality, and/or something that helped them relax or unwind
  - Seven in ten were looking for a boost or to lift their mood, and/or for escape from the worries or dullness of life
  - However six in ten were also simply looking for something good to have on in the background, and/or were just passing time.

- How 15-24 year olds define “good quality” is wide ranging and not strongly defined or described in detail.
  - The most common elements indicating higher quality are perceptions of storyline and production values, but genre, characters, being relatable and marketing are also factors for some.

Summary

How well NZ content delivers on motivations to view

- The majority of 15-24s believe NZ made shows deliver on all motivations to view quite or very well – there is little evidence that perceptions of the ability of NZ made shows to deliver on motivations to view are holding youth back.
  - More than seven in ten believe NZ made shows deliver on passing time, and/or relaxing/unwinding
  - Two thirds believe they are good to have on in the background, and/or delivering a boost

- However it should be noted that three of the strongest perceptions reflect more passive motivations to view.

- In addition perceptions of how well 15-24s' favourite things to watch deliver on motivations are more strongly positive than for NZ made shows.
  - Nearly nine in ten believe their favourite things to watch deliver on relaxing/unwinding, and/or passing time, and/or good quality, and/or delivering a boost.

➢ **NZ made shows are perceived to deliver on what 15-24s are looking for, but perhaps not quite as well as their favourite shows, which are probably from an overseas source.**

Summary

Attitudes to NZ made shows

- While NZ shows are perceived by most to deliver on motivations to view, attitudes to NZ content do vary – and some of these attitudes will be holding some 15-24s back from engaging with NZ content more often.
  - Most positively, eight in ten 15-24s enjoy seeing NZ places and faces on shows
  - Seven in ten believe that NZ shows make them a little more proud to be a New Zealander

- However only one in two believe there is a wide variety of NZ shows, and less than half agree NZ shows reflect them or their lives.

- In addition two thirds believe NZ shows aren't as good quality as overseas shows, think hardly anyone they know watches NZ shows, or say NZ shows often make them cringe. Most also believe NZ shows are usually for older people.

- There is however acknowledgment that their own media choices are playing a role in how many NZ shows they view
  - Seven in ten believe that NZ shows are usually on TV so they don't know about them to watch

➢ **The media behaviour of 15-24s is clearly the biggest influence on how much and often 15-24s watch NZ shows, however there are some negative perceptions that will also be impacting on the content they choose to watch.**

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Summary

Attitudes to NZ music

- Attitudes to NZ music are more positive than for NZ made shows.
  - Three quarters believe that NZ music makes them a little more proud to be a New Zealander
- However seven in ten also believe international music is usually better than NZ music.
- There is again acknowledgment that 15-24s' choice of media is playing a role in how much NZ music they listen to or are exposed to.
  - Six in ten 15-24s agree they would listen to NZ music more but it doesn't come up on their streaming service very often.

Summary

Perceptions of providers of TV shows

- Perceptions of the platforms and providers through which 15-24s access content are playing a key role in how much they engage with NZ shows. Perceptions of overseas online video and SVOD providers are very positive.
  - Nine in ten 15-24s believe overseas online video sites have content for them, are easy to access and have a wide variety available. In fact at least two thirds of 15-24s associate every positive perception with online video providers – including NZ content and higher quality
  - Positivity to SVOD providers is not quite as strong, and more acknowledge weaknesses such as having content for older people, cost, less NZ content and even lower quality

- Perceptions of NZ TV channels and ondemand sites are more mixed, with levels of positivity lower than overseas online video sites and SVOD providers, and more 15-24s associating weaknesses to these sources of content.
  - Strongest positive perceptions are having NZ content, higher quality and ease of access
  - Most common negative perceptions are having content for older people and less variety
  - One in two don't ever think of watching TV or ondemand

- In addition perceptions of NZ TV channels and ondemand sites are very similar, suggesting these perceptions are driven more by the source of content (ie. the provider/brand) than the media (ie. traditional vs digital) by which it is delivered.

➢ **These perceptions will be strong influences on media behaviour among 15-24 year olds and in turn on their exposure to and consumption of NZ content.**

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Summary

Sources of new content – how do we tell 15-24s about NZ content?

- One step towards more 15-24s engaging more often with NZ content is understanding how they learn about new shows or music.

- New things to watch:
  - Word of mouth through social media or close friends and family is the number one source of learning about new things to watch by a significant margin.
  - Recommendations from streaming services (ie. the algorithm) is the next most common source.

- New music:
  - Streaming services (ie. the algorithm) are the most common sources of new music
  - Word of mouth from friends and family are next most common
  - TikTok is the third most widely used source.
  - Radio stations (on air or online) are fourth most widely used

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Summary

Appeal of Kiwi cues

- All Kiwi cues appeal to most 15-24s to at least some extent – none are rejected – though some have more potential to attract this difficult audience.

- Highest levels of appeal are reserved for:
  - NZ places and landscapes
  - Kiwi humour and charm
  - Authenticity, down to earth

- All Kiwi cues appeal more to older 15-24s, Aucklanders, Māori and Pasifika

Which media are 15-24s engaging with each day, and for how long?

Which sites, channels and stations are most popular?

What opportunities do 15-24s have to be exposed to NZ content?

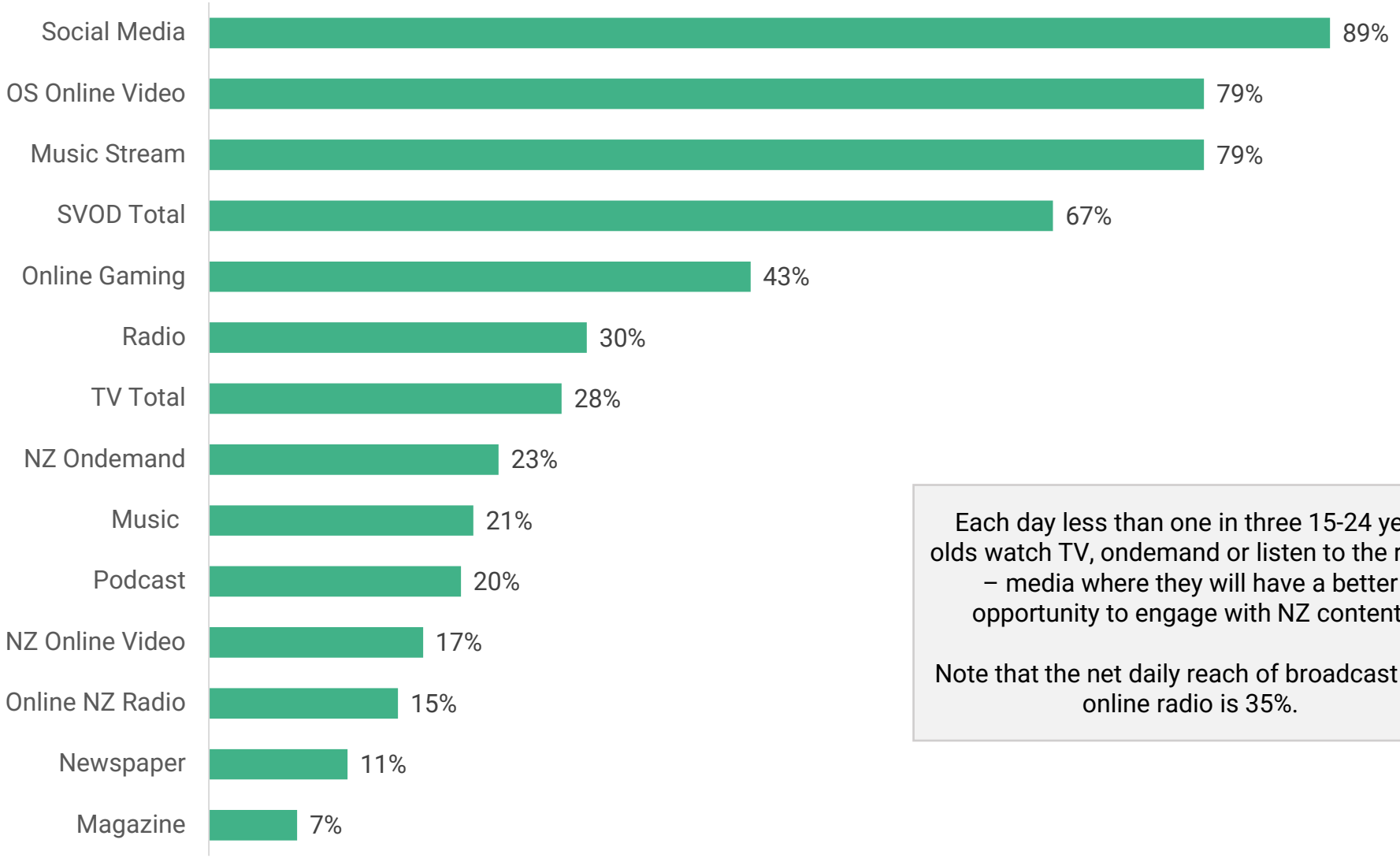
02

Daily Media Behaviour

Daily Audience Behaviour

- All 15-24s
- % Daily reach

Nine in ten 15-24s engage with social media each day, and eight in ten watch online video or listen to streamed music. Two thirds watch SVOD and four in ten play online games. Less than a third engage with any other media each day.



Each day less than one in three 15-24 year olds watch TV, ondemand or listen to the radio – media where they will have a better opportunity to engage with NZ content.

Note that the net daily reach of broadcast and online radio is 35%.

Base: All 15-24 year olds (n=706)

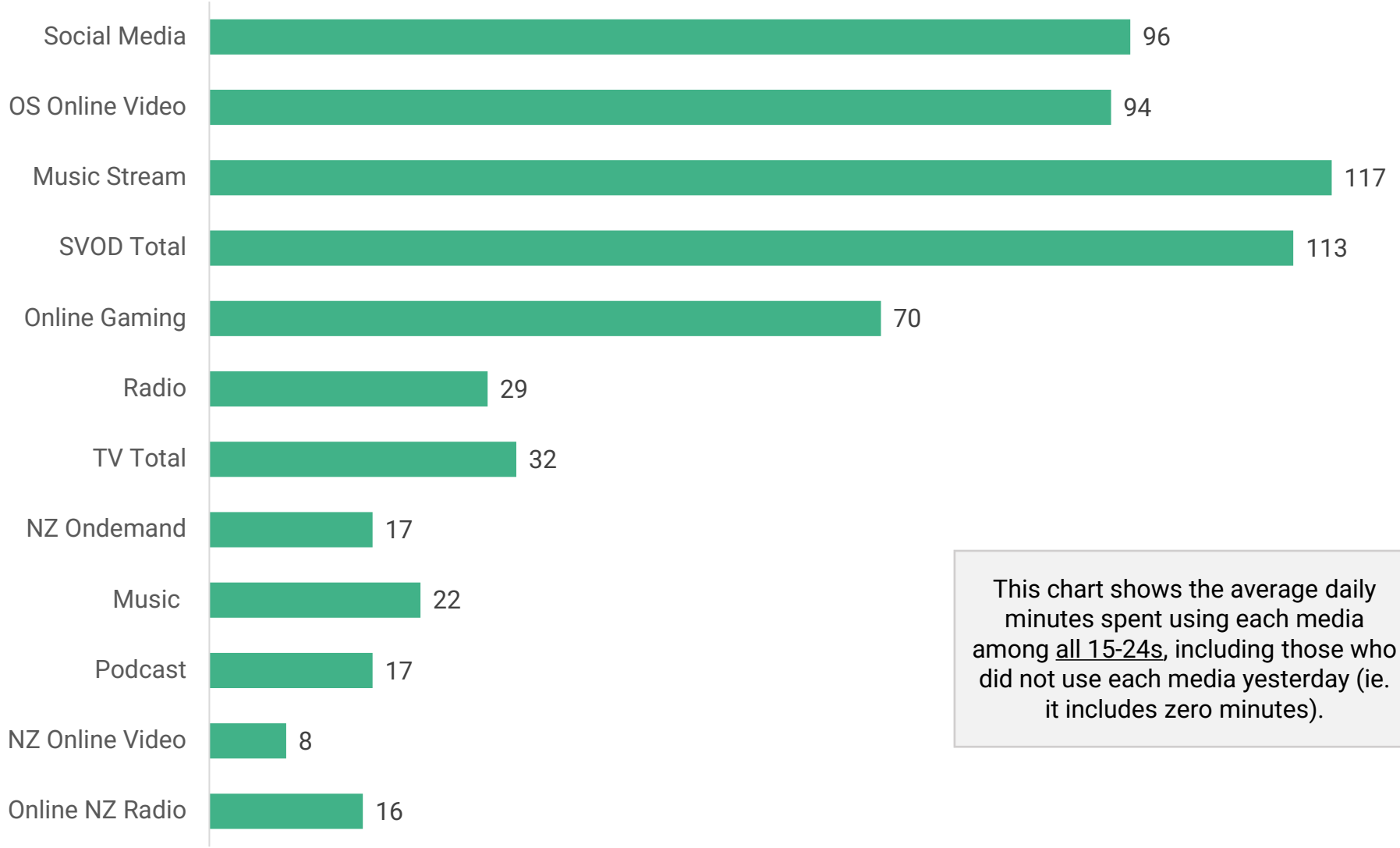
Notes:
TV viewing includes live and time shifted viewing, in and out of home.
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content. TV FTA refers to all TV viewing via a free to air platform.

Q First of all 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 yesterday. It doesn't matter if you were also doing something else at the time.

Daily Time Spent Using Media

- All 15-24s
- Total minutes per day
- Ranked by daily reach

While social media and online video attract the most 15-24s each day, youth spend more of their time listening to streamed music and watching SVOD – nearly two hours on each. Online gaming attracts the next most time at just over one hour. No other media receives more than half an hour of their time.



This chart shows the average daily minutes spent using each media among all 15-24s, including those who did not use each media yesterday (ie. it includes zero minutes).

Base: All 15-24 year olds (n=706)

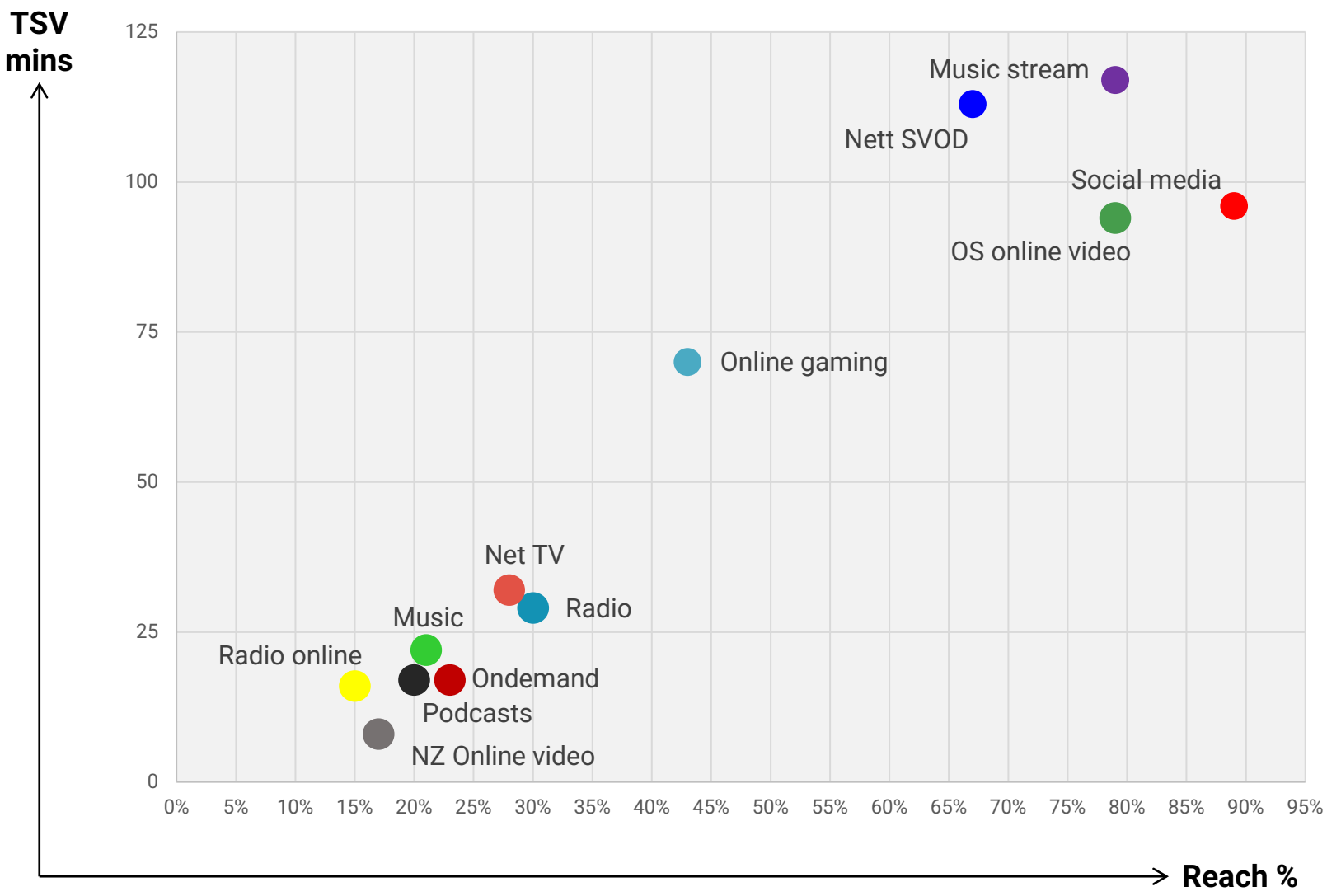
Notes:
TV viewing includes live and time shifted viewing, in and out of home.
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content. TV FTA refers to all TV viewing via a free to air platform.

Q And about how long yesterday did you (MEDIA) for?

Daily Reach & Time Spent Viewing

– All 15-24s

This chart clearly shows the gap that exists among 15-24s between the reach and time spent on the most popular digital media, and the media where most NZ content is found, with online gaming in between these two groupings.

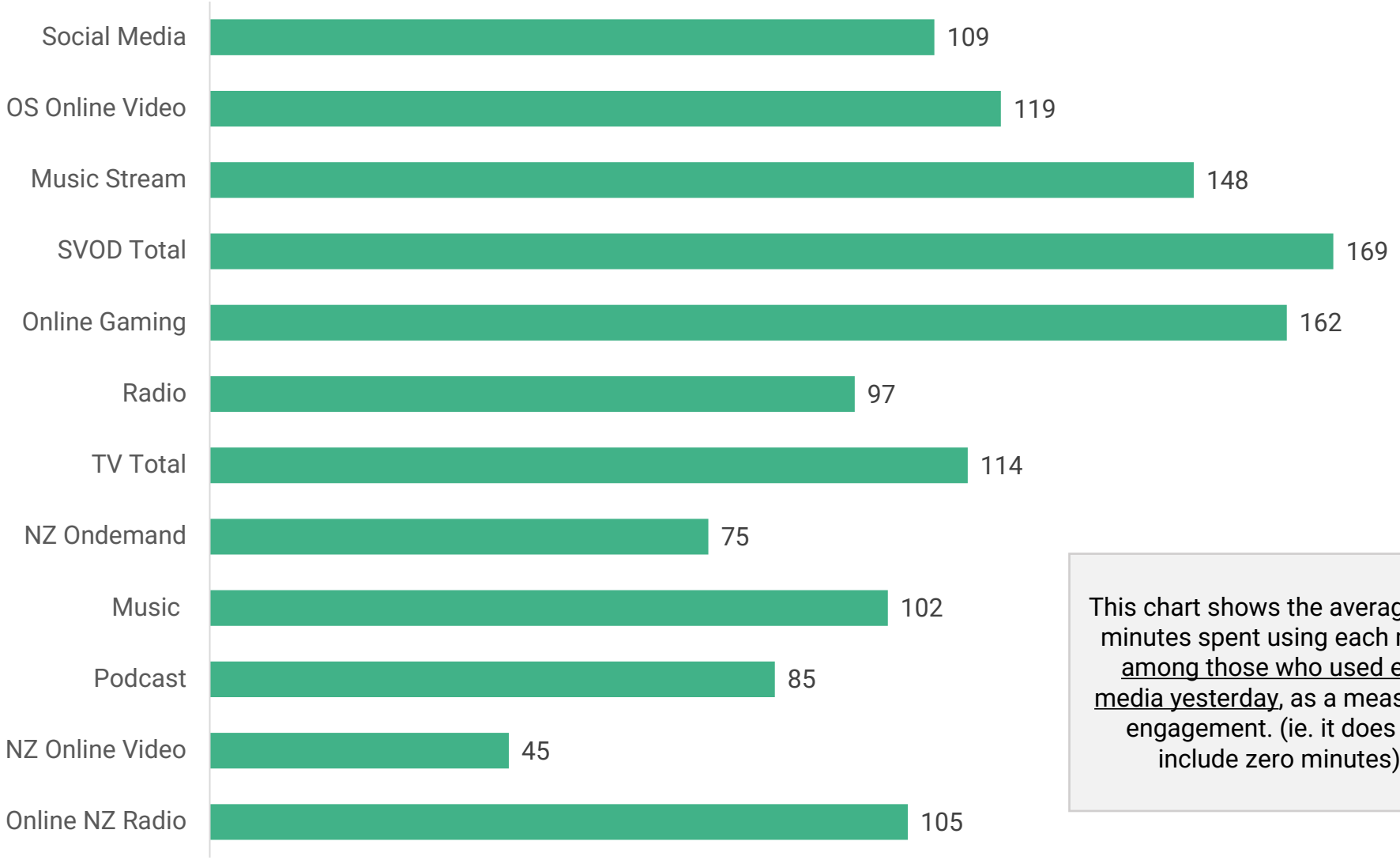


Base: All respondents (n=706)

Daily Time Spent Using Media

- Among users of each media
- Total minutes per day
- Ranked by daily reach

While audiences for traditional media are significantly smaller, those who do watch TV or listen to the radio are almost as engaged with these media as users of social media and online video. Listening to streamed music, watching SVOD and online gaming are the most engaging media for this age group.



This chart shows the average daily minutes spent using each media among those who used each media yesterday, as a measure of engagement. (ie. it does not include zero minutes).

Base: All 15-24 year olds (n=706)

Notes:
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.

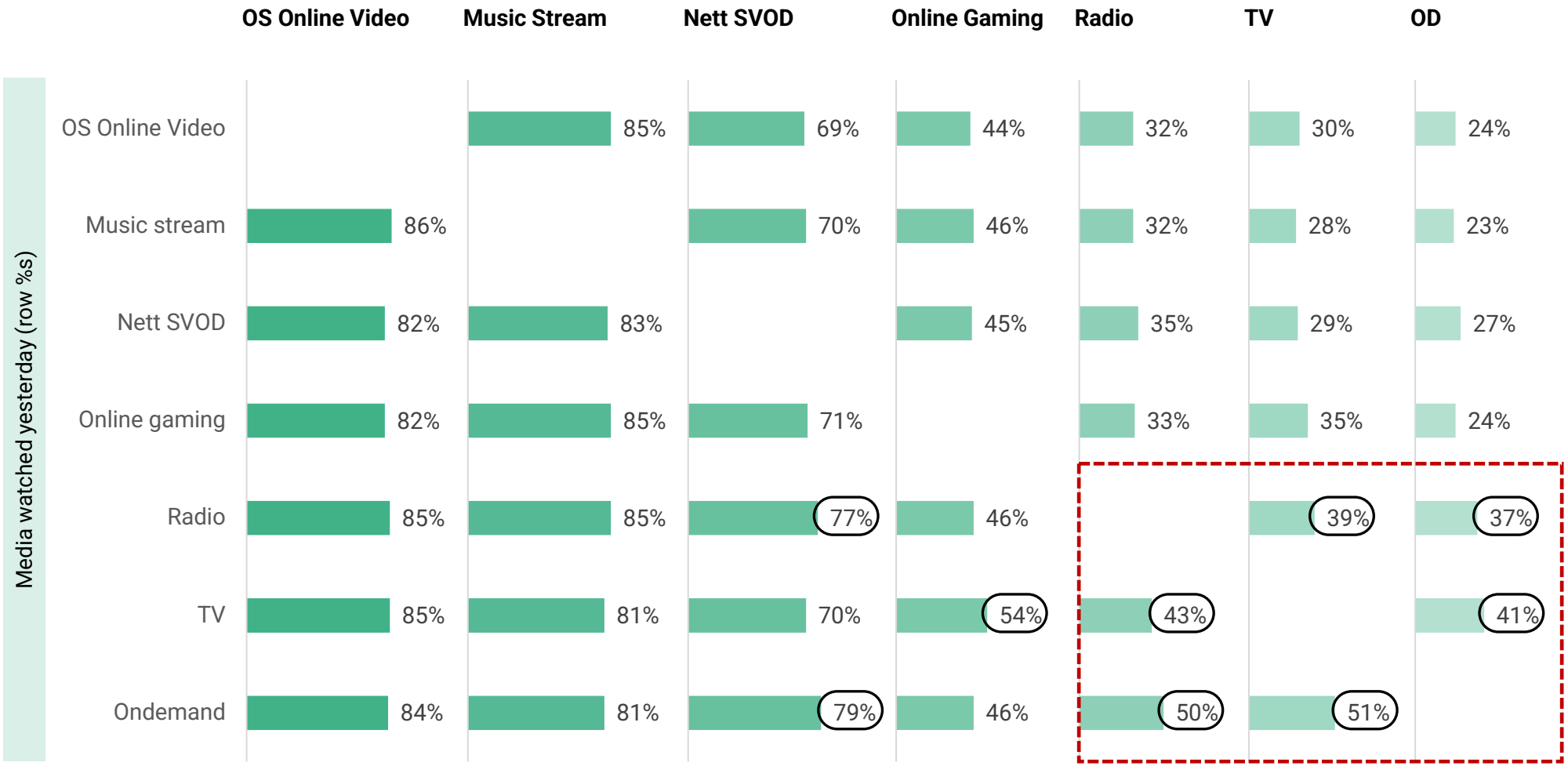
Q And about how long yesterday did you (MEDIA) for?

Repertoires of daily media

– All 15-24s

Example of how to read this chart:
Of those who watched overseas online video yesterday, 30% also watched TV that day.

There is evidence of a subgroup who are more likely to engage with media where there is more opportunity to see or hear NZ content. Those who listen to NZ radio, watch TV or watch ondemand are also more likely to engage with the other NZ based media in this grouping.



Base: All respondents (n=706)

Profiling audiences on NZ media.

– Is there a cohort within 15-24s who are more likely to use media with more NZ content?

While there is evidence of a cohort more likely to consume NZ based media, it is not strongly defined. No clear profile stands out and the trends differentiating the below sub-groups are not strong.

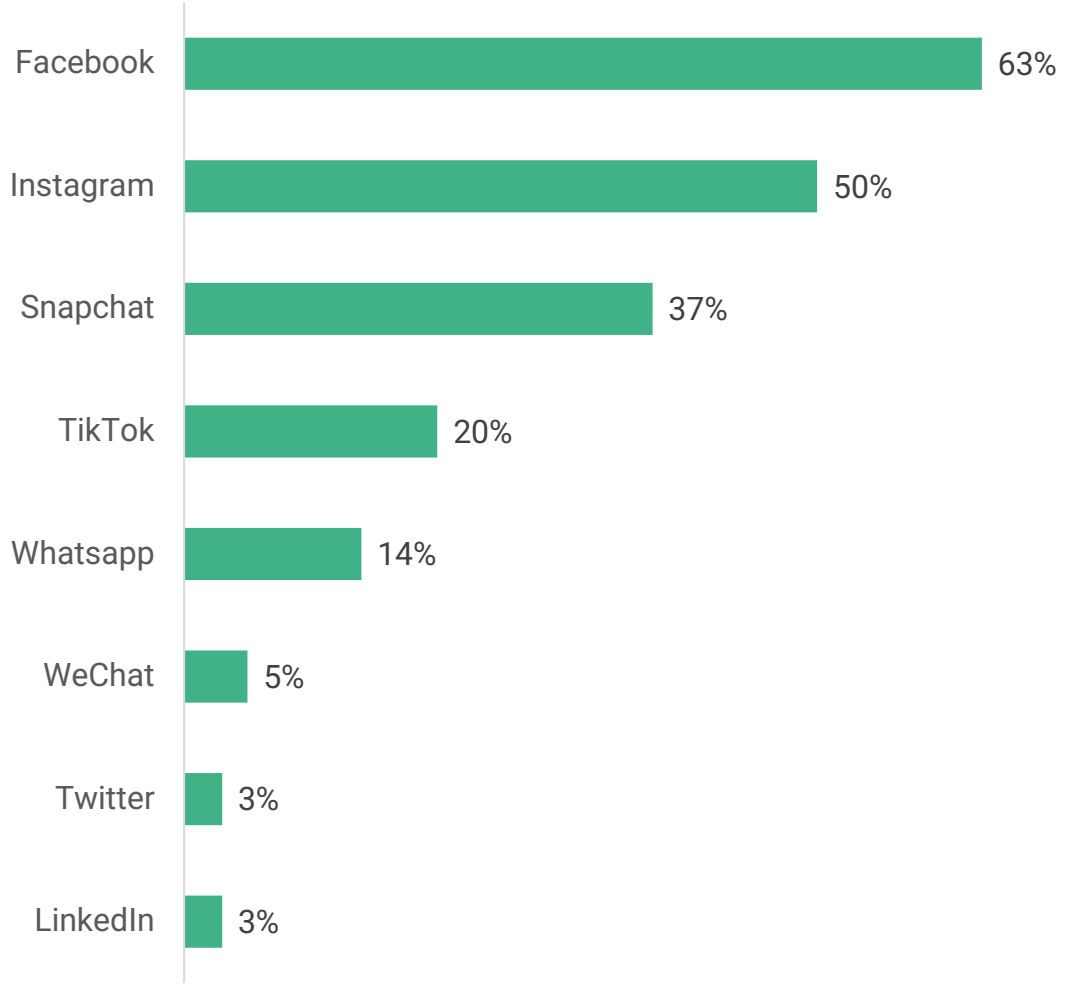
Watched TV – 28% overall	Listened to Radio – 30% overall	Watched Ondemand – 23% overall
More likely to be: • Males (33% cf. 23% female) • 15-17 year olds (34%) • Not Asian (16%)	**More likely to be:** • 21-24 year olds (34%) • South Island (33%) • Māori (35%) • Not Asian (20%)	**More likely to be:** • Not 15-17 year olds (14%) • Aucklanders (27%) • Not South Island (16%) • Pākehā (27%) • Māori (27%) • Not Asian (10%)

Daily Reach of Social Media Sites

– All 15-24s

(89% daily reach overall)

Facebook is the most popular social media site - used by two thirds of 15-24s each day - followed by Instagram attracting one in two and Snapchat used by one in three each day. TikTok is used by one in five 15-24s each day. There are some differences in terms of audience profiles (eg. Facebook is used more by females and older youth) but Snapchat is the only site to be strongly differentiated.



Base: All 15-24 year olds (n=706)

Who is most likely to use each site?

Facebook:
- Females (74% cf 53% males)
- 21-24s (81%)
- Not Asian (57%)

Instagram:
- 15-20 year olds (60%)
- Aucklanders (55%)

Snapchat:
- Females (40% cf 34% males)
- 15-20 year olds (43%)
- Not Asian (30%)
- Pākehā (44%)
- Not Pasifika (18%)
- Not Asian (27%)

TikTok:
- Not South Island (11%)

WeChat:
- Asian (15%)

Q Which social media sites did you use yesterday to engage with friends and family?

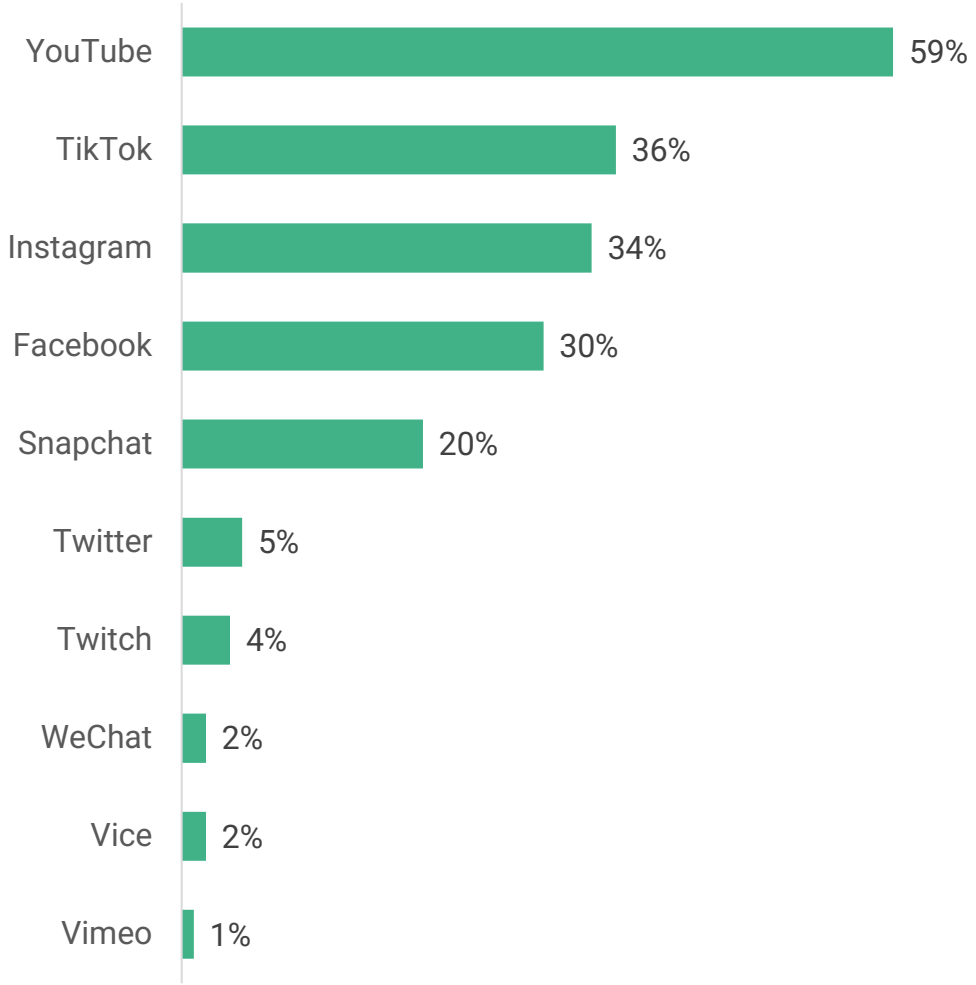
Daily Reach of Overseas Online Video Sites

– All 15-24s

(79% daily reach overall)

YouTube is easily the most popular overseas online video site among 15-24s, attracting nearly six in ten of this group each day. TikTok, Instagram and Facebook reach the next biggest audiences with about one in three using these sites to watch video each day. With the exception of Snapchat, other online video sites do not reach a large audience among 15-24s.

All main sites skew towards a female audience except YouTube which is more appealing to males.



Base: All 15-24 year olds (n=706)

Who is most likely to use each site?

YouTube:
- Males (68% cf 49% females)
- 15-17s (64%)
- Asian (71%)

TikTok:
- Females (45% cf 29% males)
- 15-17s (64%)
- Asian (71%)

Instagram:
- Females (43% cf 26% males)
- Not Māori or Pasifika (27%)

Facebook:
- Females (40% cf 21% males)
- 18-24s (35%)

Snapchat:
- Females (24% cf 15% males)
- 15-20s (25%)
- Not Aucklanders (14%)
- Pākehā (22%)
- Māori (21%)

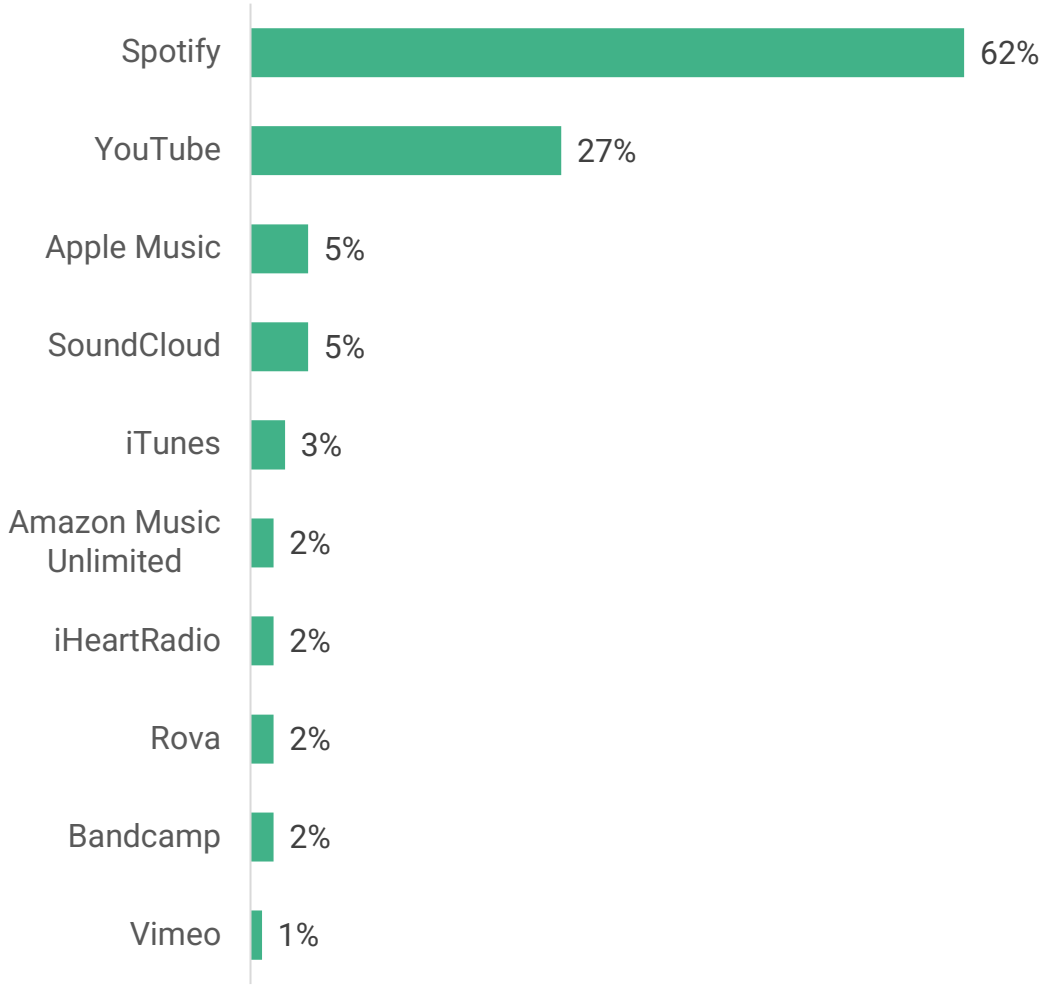
Q Thinking about watching videos on overseas websites yesterday, which overseas websites/apps did you use?

Daily Reach of Music Streaming Sites

– All 15-24s

(79% daily reach overall)

Spotify attracts the biggest audience among 15-24s to streamed music with nearly two thirds tuning in each day. YouTube is second most popular but only reaches one in four each day. No other music streaming service reaches more than 5% of 15-24s each day.



Base: All 15-24 year olds (n=706)

Who is most likely to use each site?

Spotify
- Females (64% cf 59% males)
- Not Pasifika (48%)

YouTube:
- No significant trends

SoundCloud:
- Males (8% cf 2% females)

Amazon Music:
- Males (4% cf 1% females)

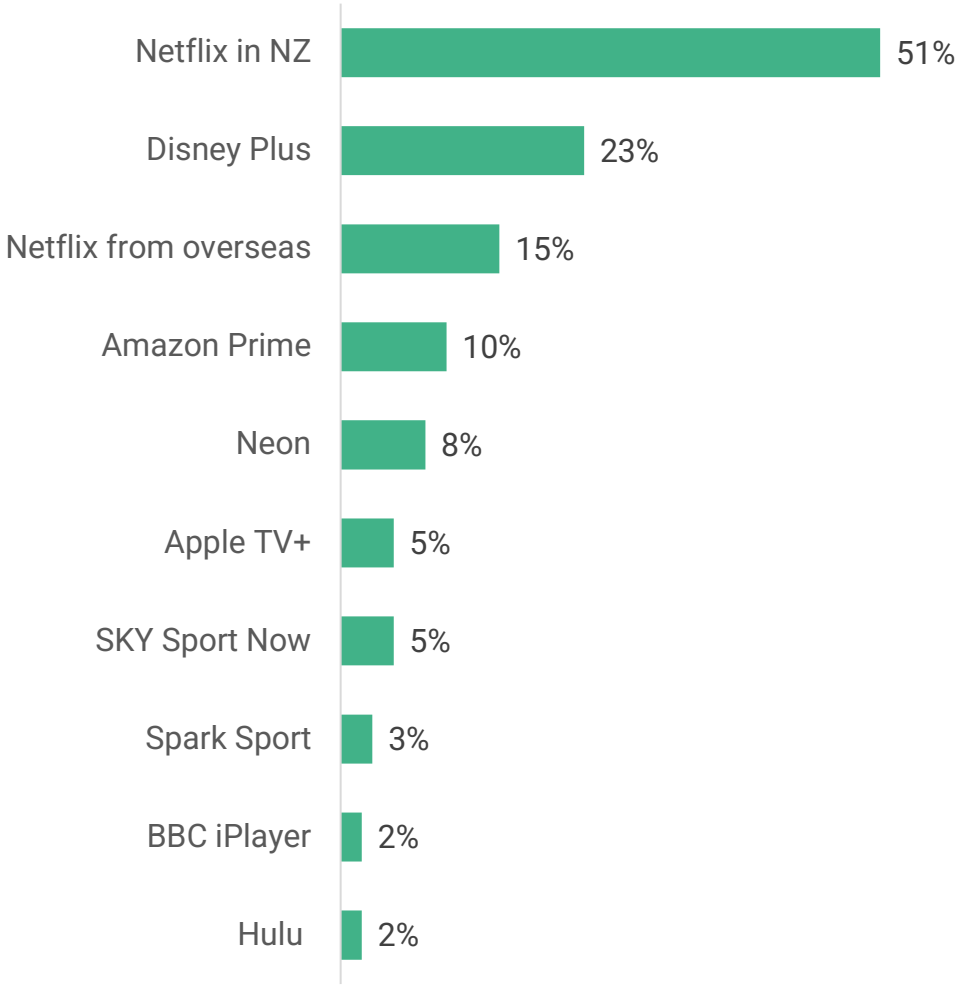
Q Thinking about listening to music online yesterday, which websites/services did you use?

Daily Reach of SVOD Services

– All 15-24s

(67% daily reach overall)

Netflix is the most popular SVOD provider reaching one in two 15-24 year olds each day, while Disney Plus is watched by one in four. Both are more appealing to females than males.



Who is most likely to use each site?

Netflix
- Females (55% cf 47% males)

Disney Plus:
- Females (26% cf 20% males)
- 18-24s (25%)

SKY Sport Now:
- Males (7% cf 2% females)

Base: All 15-24 year olds (n=706)

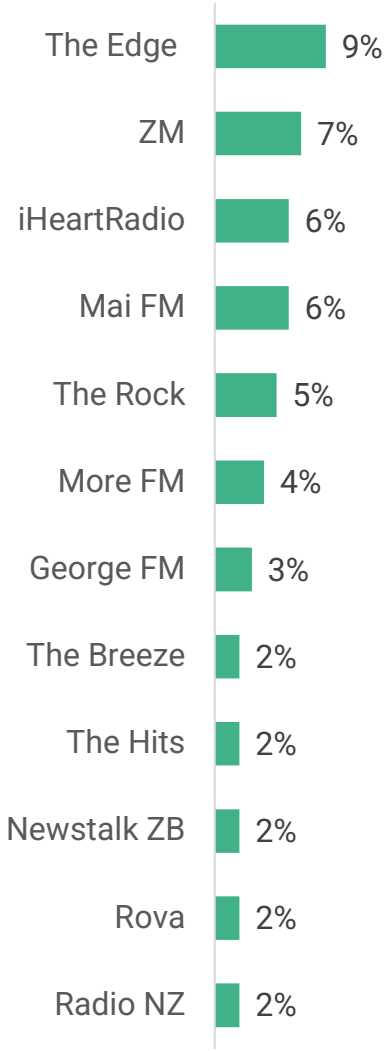
Q Thinking about watching TV shows online yesterday, which websites/services did you use?

Daily Reach of Radio Stations

– All 15-24s

(30% daily reach overall)

Radio listening is very fragmented among 15-24 year olds with no station reaching more than one in ten each day, and a long tail of stations that reaches 1% or less.



In addition there are another eight stations that attract 1% daily reach among 15-24s, and another 10 that reach above 0% but less than 1%.

Base: All 15-24 year olds (n=706)

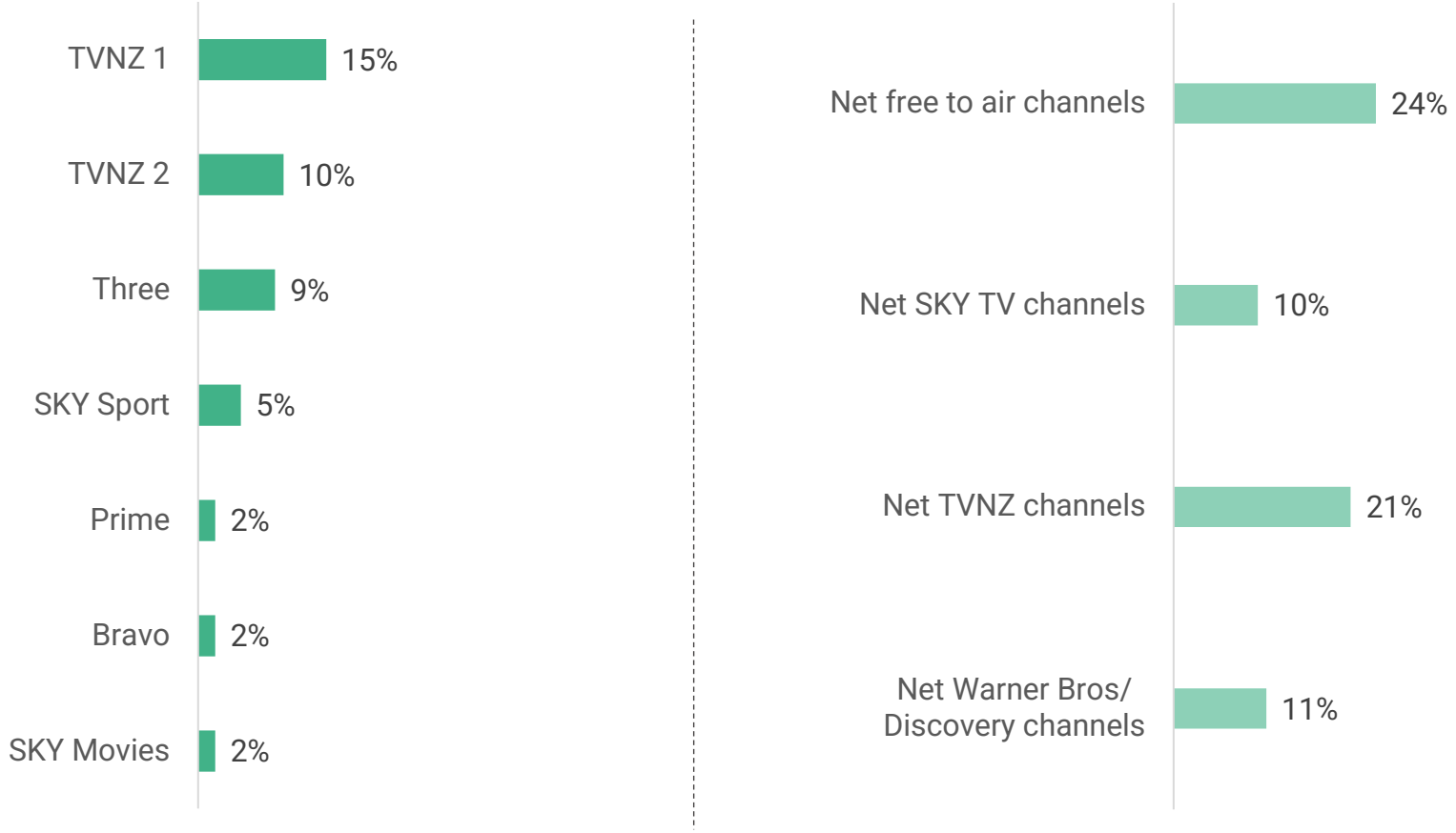
Q Thinking about yesterday overall what New Zealand radio stations did you listen to either on radio or online?

Daily Reach of TV Channels

– All 15-24s

(28% daily reach overall)

TVNZ 1 attracts the biggest TV audience among 15-24s with 15% watching each day, followed by TVNZ 2 and Three which reach one in ten.



In addition there are another 18 channels that attract 1% daily reach among 15-24s, and another six that reach above 0% but less than 1%.

Base: All 15-24 year olds (n=706)

Q Thinking about yesterday overall which TV channels did you watch?

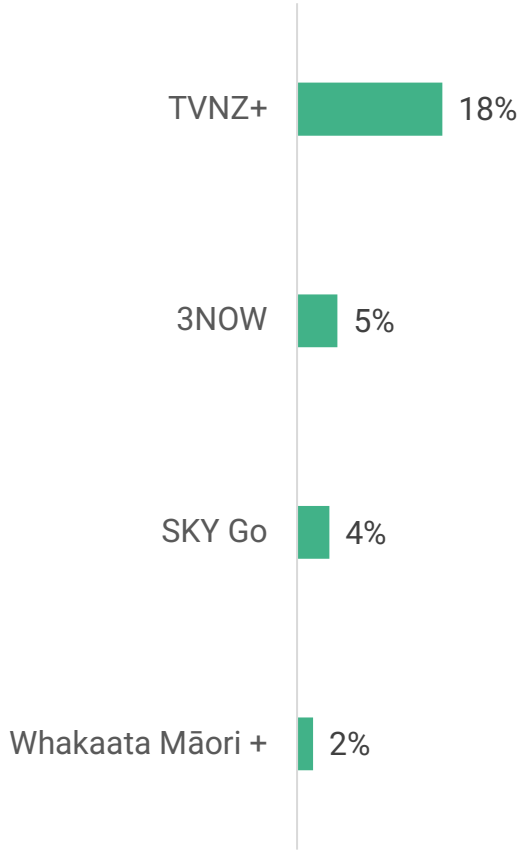
Daily Reach of Ondemand Sites & Reasons for Using Ondemand

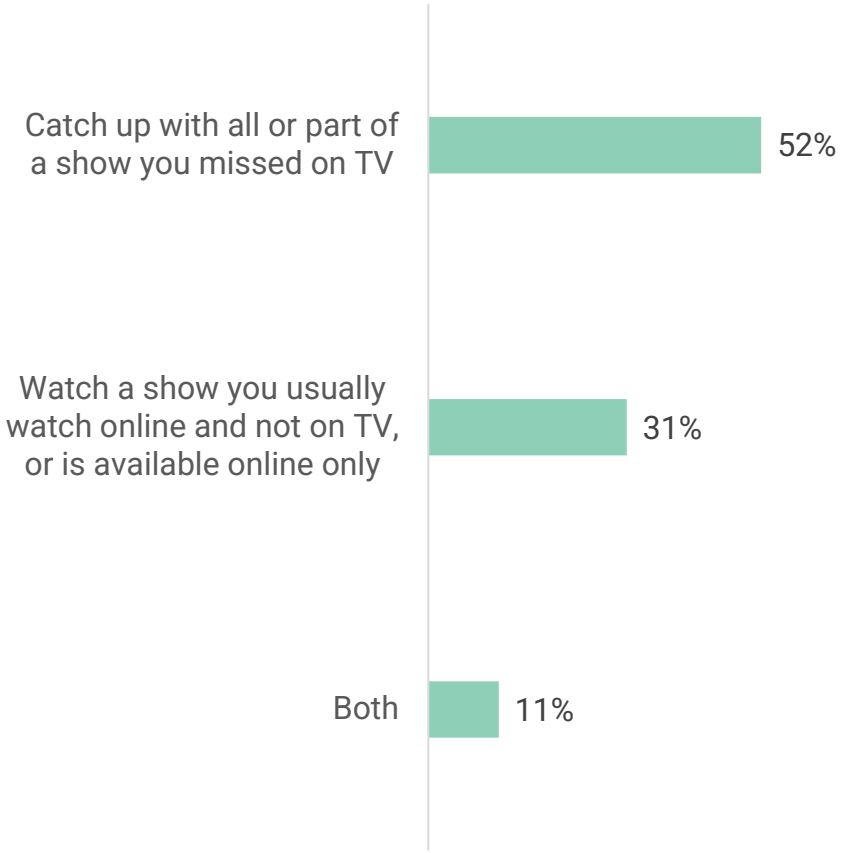
– All 15-24s

(23% daily reach overall)

TVNZ + is the most popular ondemand site reaching nearly one in five 15-24s each day. In fact TVNZ+ attracts the biggest daily audience of any single NZ site, channel or station, demonstrating this audience's engagement with digital media.

However, perhaps counter intuitively, catching up is the reason driving most ondemand viewing among 15-24s although three in ten use it for watching online only content.





Base: All 15-24 year olds (n=706)

Base: Watched ondemand yesterday (n=159)

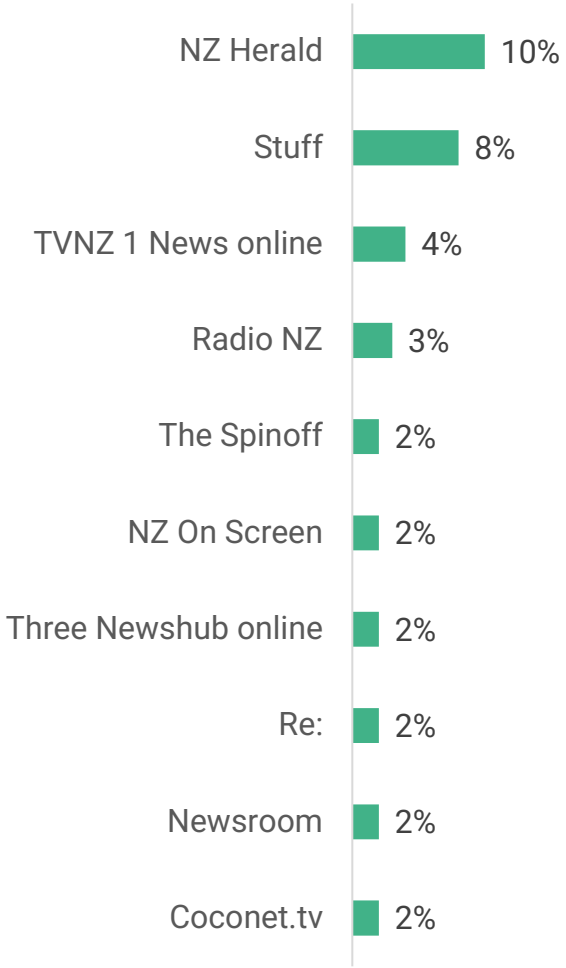
Q Thinking about watching Ondemand yesterday which websites or apps did you use?
Q: Thinking about when you used ondemand yesterday did you use it to...?

Daily Reach of NZ Online Video Sites

– All 15-24s

(17% daily reach overall)

Online videos on NZ Herald and Stuff each reach about one in ten 15-24s each day.



Note that most of the sources of NZ online video are news based – a type of content that 15-24s have traditionally been less engaged with overall.

Base: All 15-24 year olds (n=706)

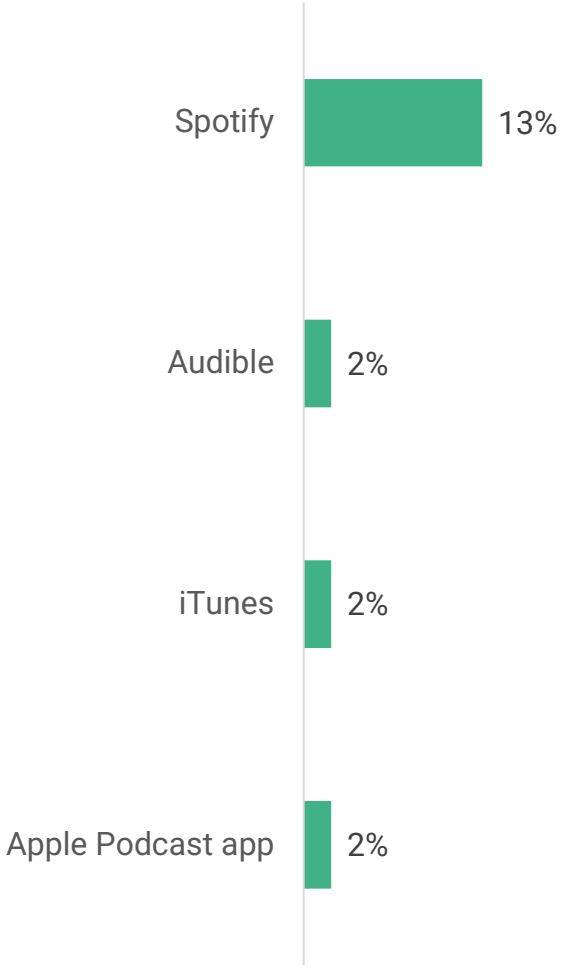
Q Thinking about watching video on NZ websites yesterday, which New Zealand sites did you use?

Daily Reach of Sources of Podcasts

– All 15-24s

(17% daily reach overall)

Spotify is easily the most widely used source of podcasts among 15-24s.



In addition Radio NZ, Internet search, Pocket Casts, NZ Herald, Stitcher, and Stuff are all used by 1% of 15-24 year olds.

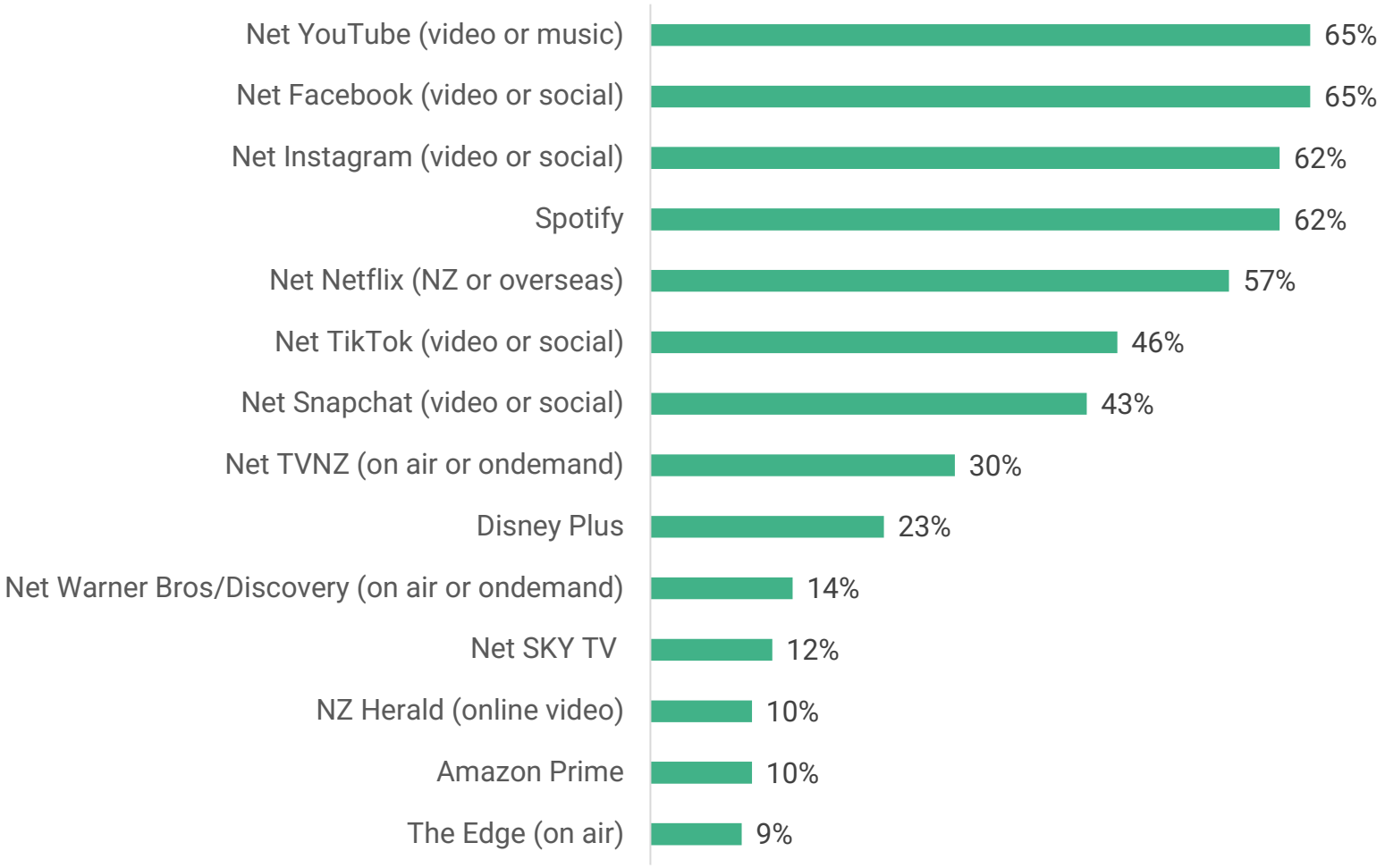
Base: All 15-24 year olds (n=706)

Q What websites or apps did you use to listen to podcasts yesterday?

Summary of Net Daily Reach of Top Media Providers

– All 15-24s

About two thirds of 15-24s use YouTube, Facebook, Instagram or Spotify each day with Netflix only slightly below those. TVNZ is the NZ based media which reaches the most 15-24s each day (30%).



Base: All 15-24 year olds (n=706)

How often do 15-24s watch a NZ show or listen to NZ music?

Which 15-24s are more or less likely to do so?

03

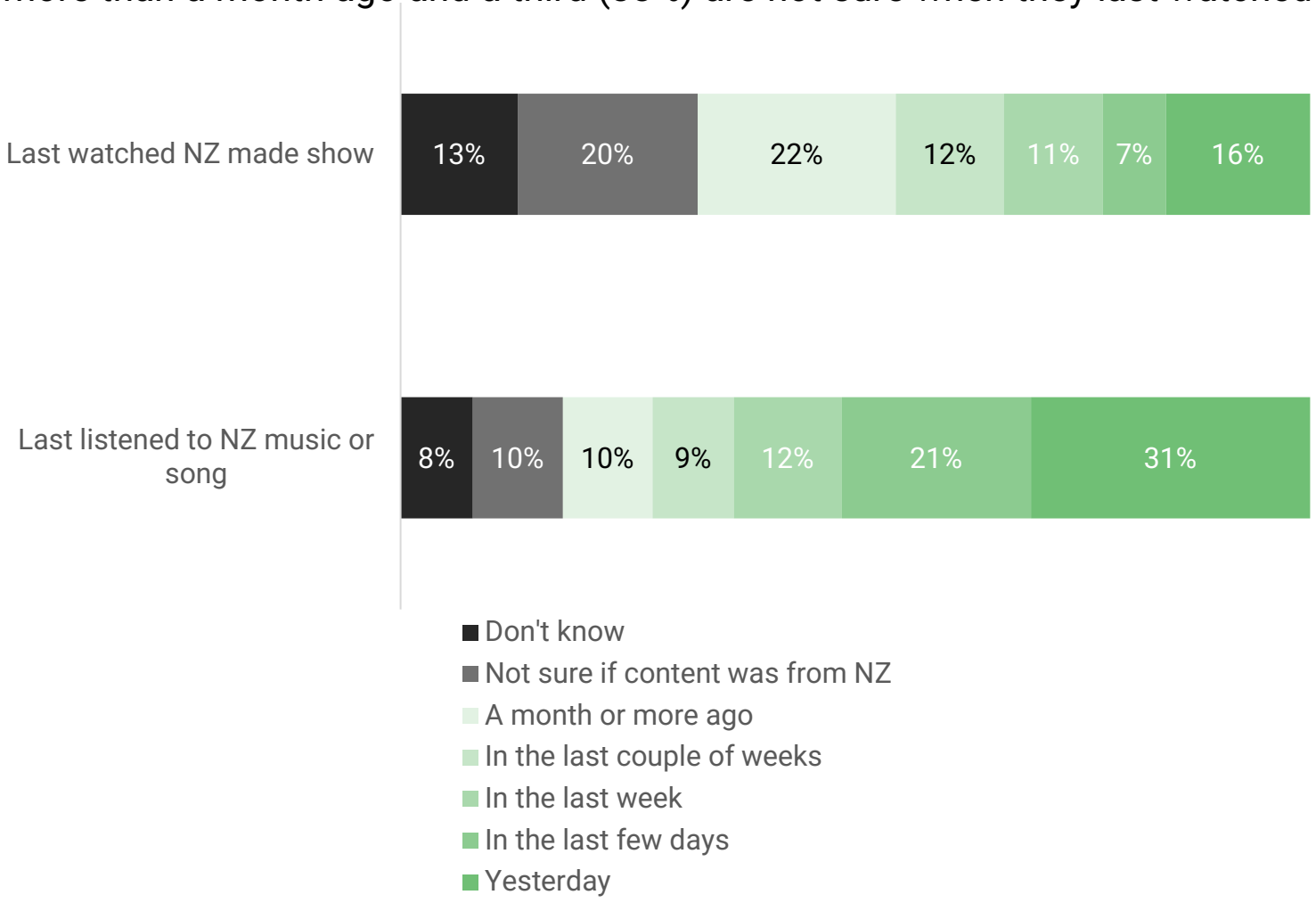
Consumption of NZ Content

Recency of consuming NZ content

– All 15-24s

15-24s are more likely to have listened to NZ music recently - one in two (52%) have done so in the last few days – than watched a NZ made show. Three in ten listened to NZ music yesterday and another third did so at least once in the last week

While one in four (23%) have watched a NZ made show in the last few days, just as many (22%) did so more than a month ago and a third (33%) are not sure when they last watched a NZ made show.



Males are more likely to have watched a NZ made show recently – 20% did so yesterday.

Most likely to have listened to NZ music yesterday:

- Males (34%)
- 18-24s (33%)
- Māori (45%)
- Pasifika (44%)

Base: All 15-24 year olds (n=706)

Q When was the last time you watched a New Zealand made show?
Q: When was the last time you listened to New Zealand music or song?

How did 15-24s decide what to watch yesterday?

How do they define “good quality”?

04

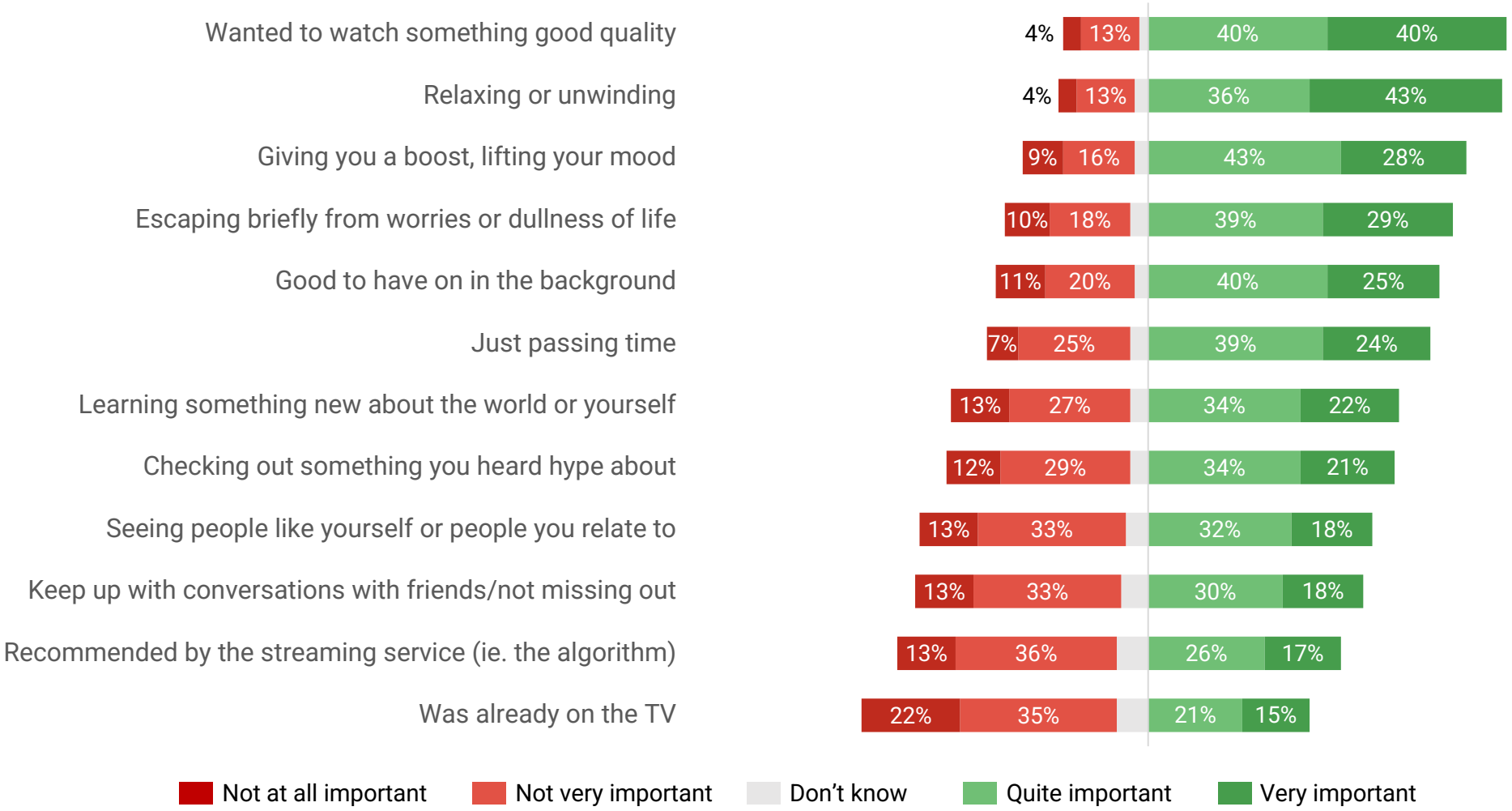
Video Content Motivations (yesterday)

How they decided what to watch yesterday

– All 15-24s

Perceptions of quality and relaxation are the most important motivations for deciding what to watch, while seven in ten are looking for a boost or for escape. Six in ten are simply looking for something to have on in the background or are just passing time.

Most 15-24s say they make active choices rather than simply watching what was already on TV.



Base: All respondents(n=368-394)

Note:
To manage interview length, each respondent was shown a random selection of six of the twelve statements resulting in a reduced and variable sample size for each.

Q Please think about what you watched yesterday on TV, ondemand or online streaming service like Netflix or Disney Plus, please tell me how important each of the following was in deciding what you watched yesterday.

How they decided what to watch yesterday

– All 15-24s

Motivations for content decisions vary depending on gender, region and ethnicity. In particular females tend to make more active decisions than males, while Aucklanders are more likely to make passive choices than the rest of the country.

Trends by gender:

More important motivations for females:

- Relaxing and unwinding
- Giving you a boost, lifting your mood
- Escaping briefly from the worries or dullness of life
- Good to have on in the background

More important motivations for males:

- Just passing time
- Recommended by algorithm
- Already on the TV

However males' decisions are also more likely to be motivated by:

- Learning something new about the world or yourself
- Keeping up with conversations/fomo

Trends by region:

More important motivations for Aucklanders:

- Just passing time
- Recommended by algorithm
- Already on the TV

However Aucklanders' decisions are also more likely to be motivated by:

- Learning something new about the world or yourself

Trends by ethnicity:

More important motivations for Pasifika and Asian:

- Pasifika (66%) and Asian youth (61%) are more likely to be motivated by seeing people like themselves.

Irirangi Te Motu NZ On Air Glasshouse

Q Please think about what you watched yesterday on TV, ondemand or online streaming service like Netflix or Disney Plus, please tell me how important each of the following was in deciding what you watched yesterday.

How do 15-24s define “good quality”?

“Good quality” means different things to different people and is not strongly defined as most respondents could not give detailed or multi-faceted responses. However the broad categories of storyline and production values give strongest signals of quality to 15-24s.

Story

Good plot/storyline/good writing	25%
Interesting/captivating/want more/can’t stop watching	13%
Original/unpredictable/immediately grabs attention	5%
Lasting impression/thought provoking/good ending	3%
Easy to watch/Easy to understand	3%
Content	2%

Production

Actors/cast	9%
Acting	9%
Cinematography/camera quality/production	8%
HD/picture quality	3%
Special effects/vivid images/visuals/graphics	3%
Script/dialogue	3%
Sound quality	2%
Editing	1%
Director	1%
Music	1%

Genre

Good laugh/comedy/humour/funny	12%
Drama/Crime	3%
Action	3%
Cliffhangers/suspense	2%
Learn something/documentaries	2%

Characters

Interesting/good/complex/mix of characters	6%
Relatable characters	2%
Character development	1%

Relatable

Relate to it/Aimed at me/Interests I can relate to	3%
Realistic/makes sense/not CGI	3%
Up to date with real world/true story/current ideas	2%

Marketing

Hype/popular/friends watching it/recommended	3%
Big brand/Reputable	1%

Plus generic comments of:

- “Quality”/”great” – 8%
- “Entertaining” – 6%
- Don’t know/depends – 5%

- Plus “other” comments – 12%

Base: All who said “wanted to watch something good quality” yesterday (n=311)

Q What makes a show good quality?

How well do 15-24s believe NZ content delivers on their motivations to view?

How does that compare to their favourite things to watch?

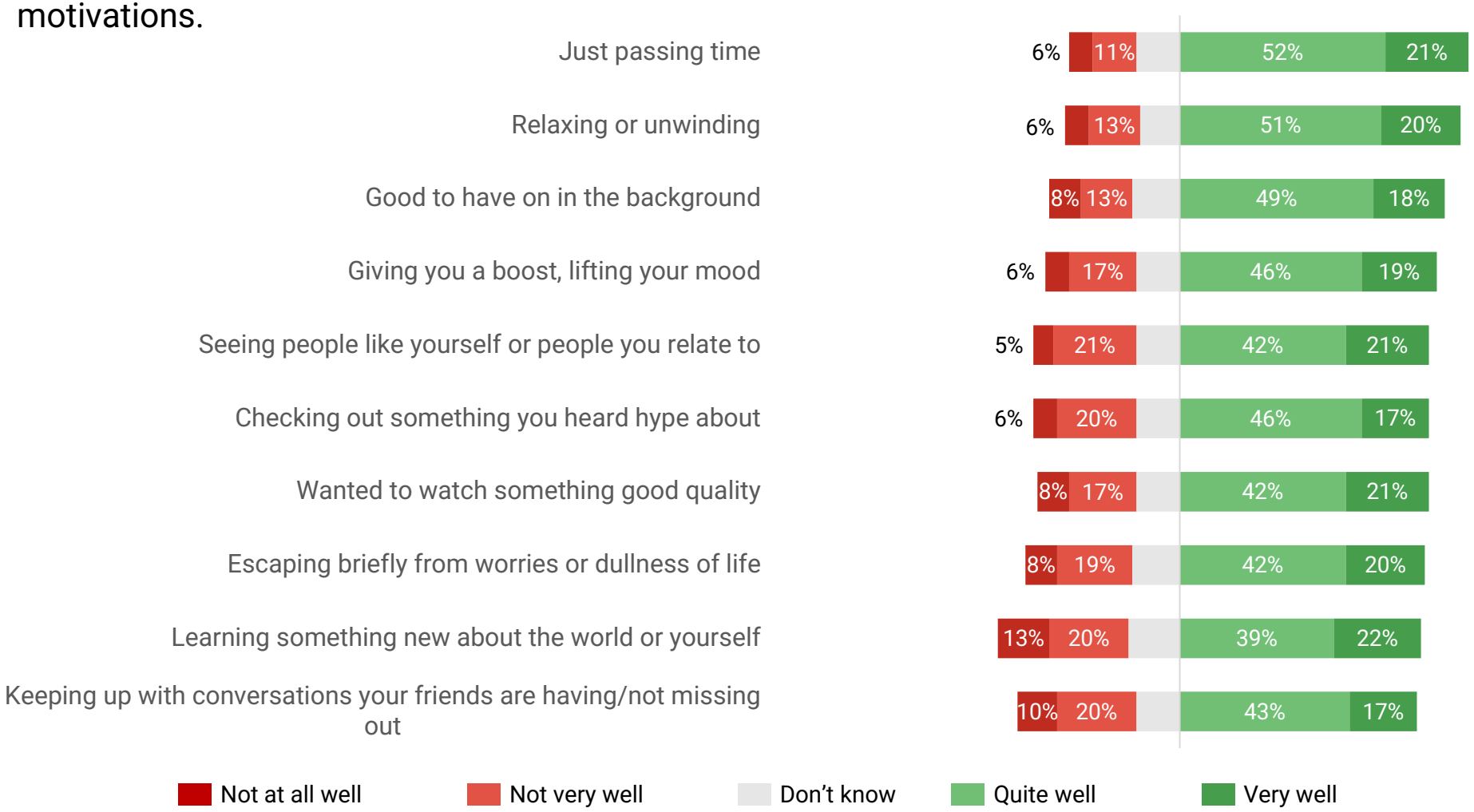
What are their attitudes to NZ content?

05 NZ Content Delivery & Attitudes

How well do NZ shows deliver on motivations to watch?

– All 15-24s

At least six in ten 15-24s believe NZ made shows deliver on each motivation quite or very well – there is little evidence in these results that perceptions of NZ shows ability to deliver on motivations to watch are holding youth back from watching those shows. However it should be noted that the three strongest perceptions reflect more passive motivations to view as opposed to more engaged motivations.



Base: All respondents(n=488-513)

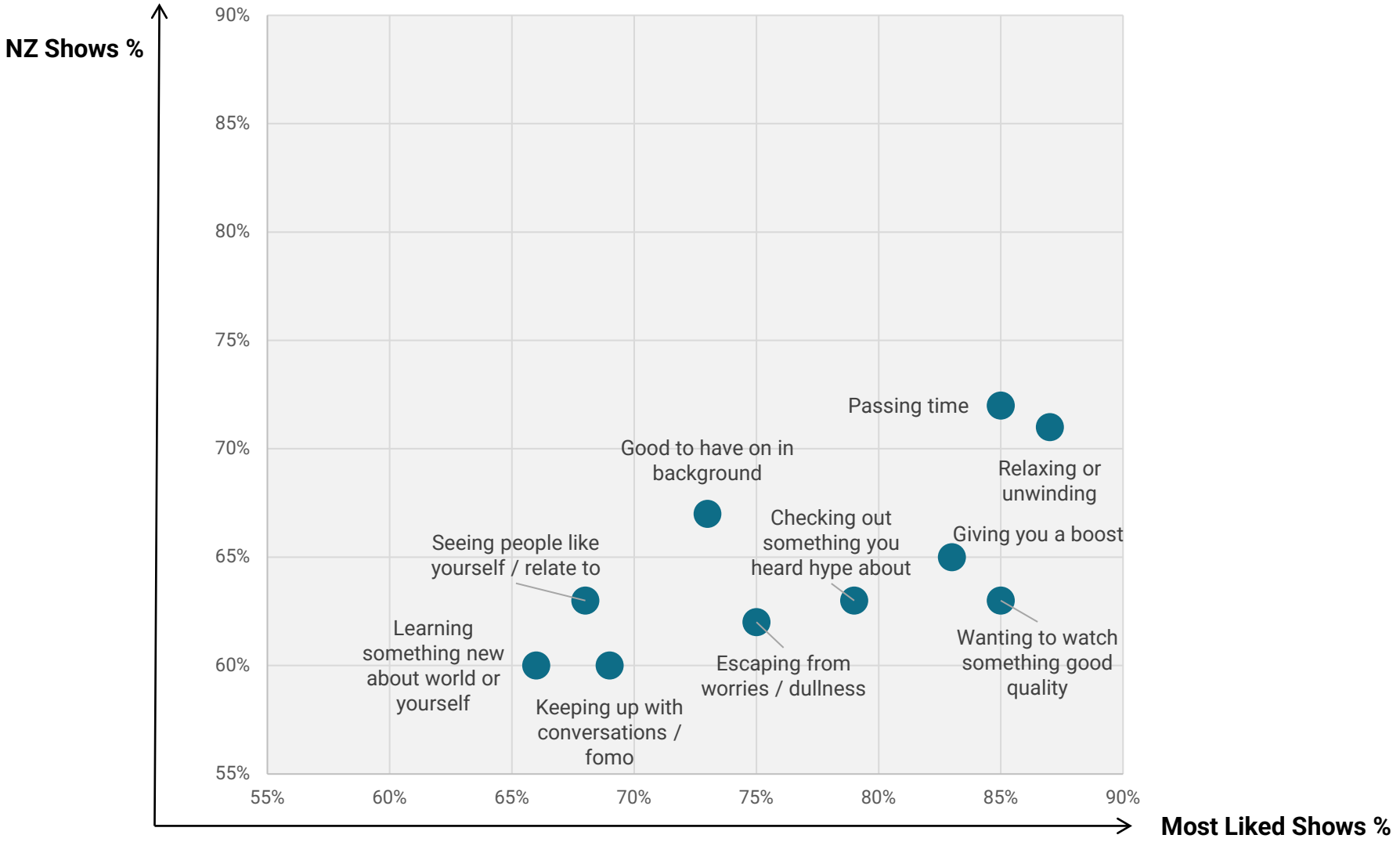
Note:
To manage interview length, each respondent was shown a random selection of six of the twelve statements resulting in a reduced and variable sample size for each.

Q Please think about New Zealand made shows overall, how well do you think these shows deliver each of the following?

How do NZ shows compare to most loved shows?

- All 15-24s
- Based on % who feel NZ shows/ most liked shows deliver quite or very well on each

Relaxing/unwinding and passing time are the two most common attributes of favourite shows, and also NZ shows' strongest attributes. NZ shows deliver less well on the next most common attributes of most liked shows – good quality and giving viewers a boost. Overall NZ shows are perceived to deliver less well on all attributes.



Base: All respondents (n=488-513)

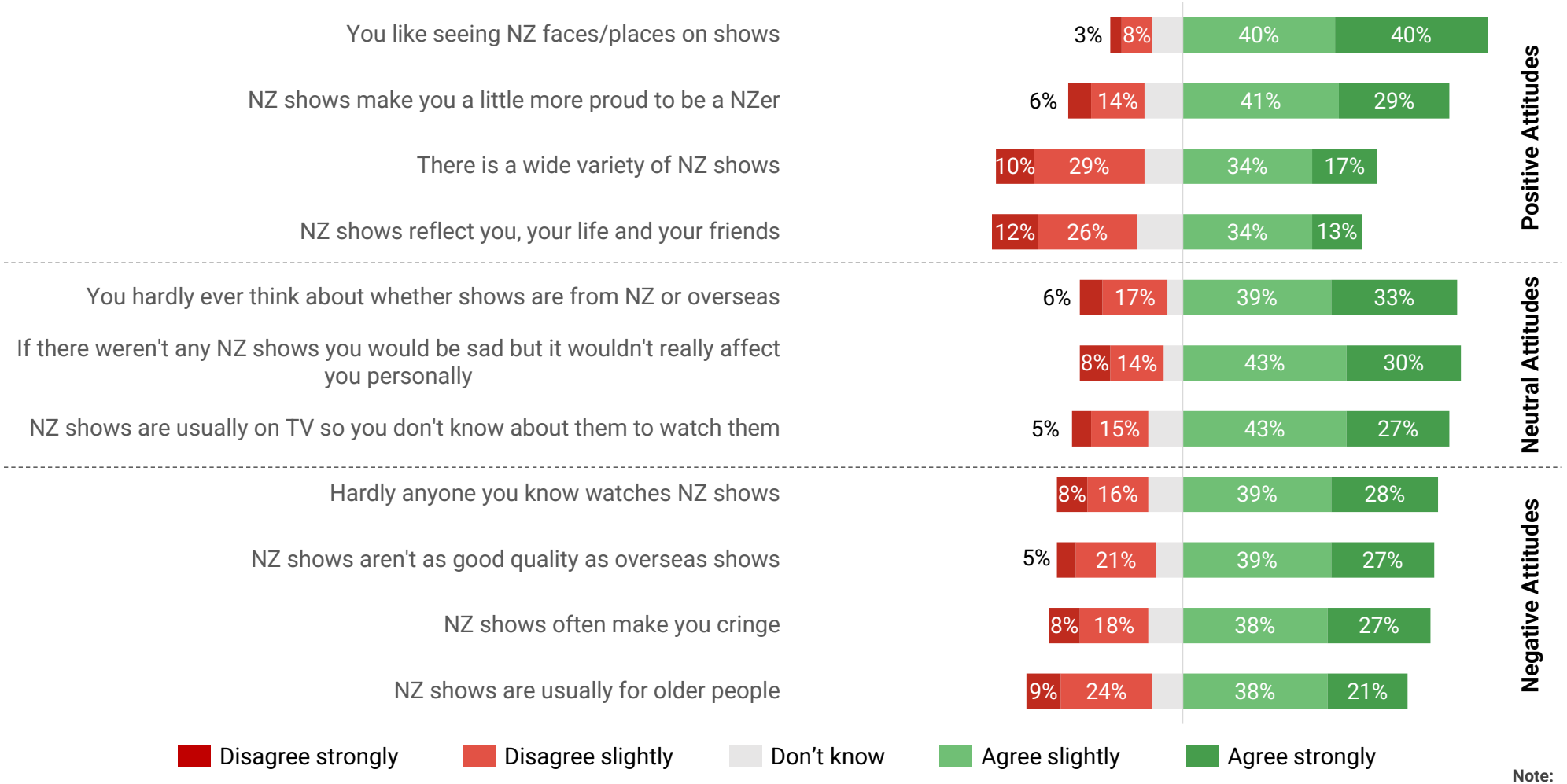
Note:
To manage interview length, each respondent was shown a random selection of six of the twelve statements resulting in a reduced and variable sample size for each.

Q Please think about New Zealand made shows overall, how well do you think these shows deliver each of the following?
Q: Please think about the shows you like most on TV or on streaming services like Netflix or Disney Plus, overall how well do you think these shows deliver on the following?

Attitudes to NZ Made Shows

– All 15-24s

Eight in ten 15-24s agree they like seeing NZ faces and places on shows, and seven in ten say NZ made shows make them feel a little more proud to be a Kiwi. There is less positivity about the variety of NZ shows or reflecting them and their lives. In addition two thirds believe NZ shows lack the quality of overseas shows, few people they know watch them, and often make them cringe. This indicates there are key attitudes that will be holding 15-24s back from viewing more NZ shows more often.



Base: All respondents(n=522-577)

Note:
To manage interview length, each respondent was shown a random selection of eight of the fifteen statements resulting in a reduced and variable sample size for each.

Older youth (18-24s) are more likely to express all positive attitudes towards NZ shows, as are Māori and Pasifika.

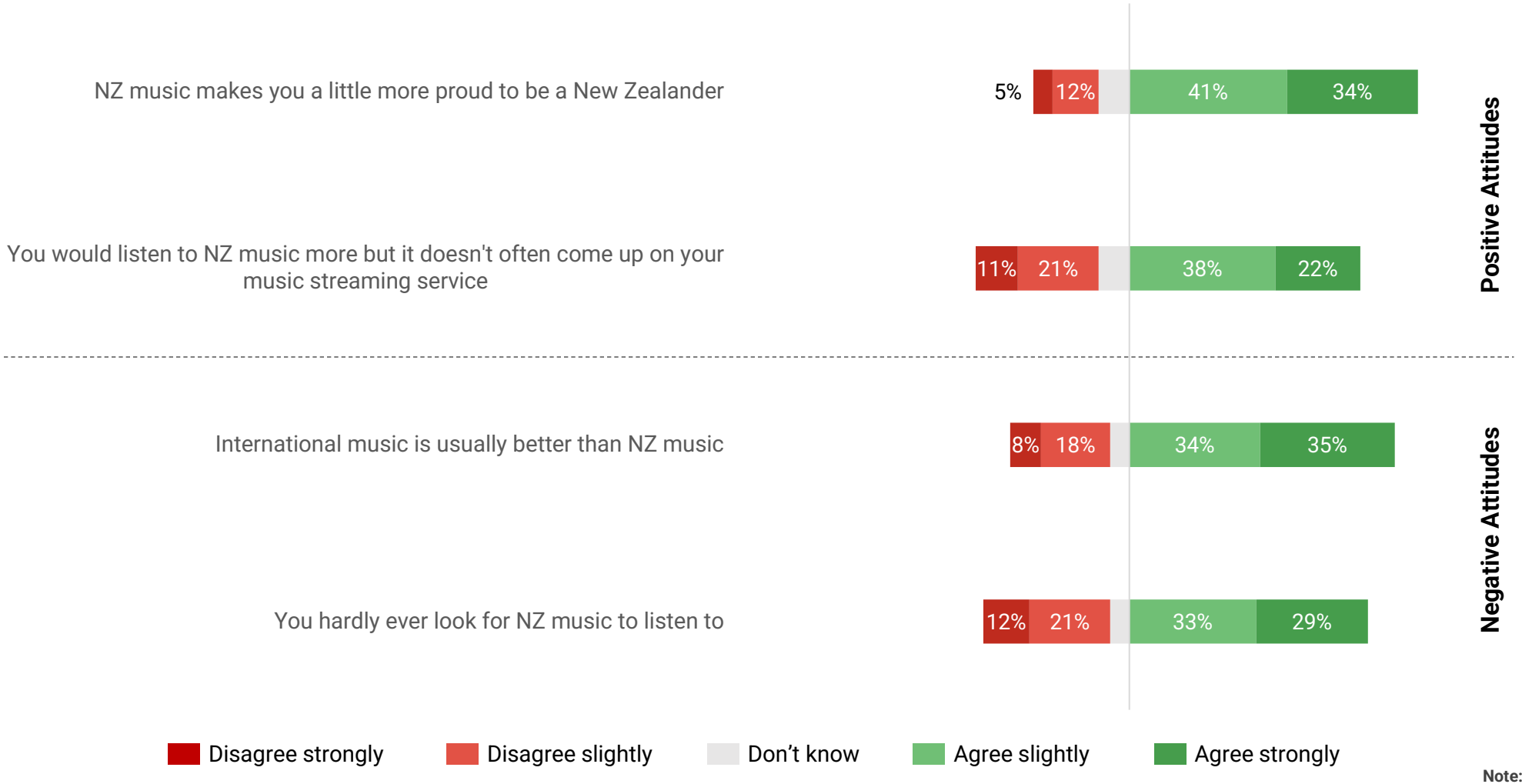
There are few differentiating trends for negative attitudes, indicating these are more widely held.

Q For each one please tell me whether you agree strongly or slightly or disagree strongly or slightly with that statement.

Attitudes to NZ Music

– All 15-24s

Three quarters of 15-24s agree NZ music makes them a little more proud to be a Kiwi. However six in ten agree they hardly ever look for NZ music and seven in ten believe international music is usually better than NZ music. One barrier will be the algorithms on streaming services as six in ten believe they would listen to NZ music more if it came up more often on their streaming service.



Females (80%) are more likely to feel proud when they hear NZ music than males, whereas males are more likely to feel international music is better than NZ music (74%) or that they hardly ever look for NZ music to listen to (70%).

There is also a trend indicating that the older end of the age group are more likely to hold positive attitudes, while the younger end are more likely to be negative.

Base: All respondents(n=522-577)

Note:
To manage interview length, each respondent was shown a random selection of eight of the fifteen statements resulting in a reduced and variable sample size for each.

Q For each one please tell me whether you agree strongly or slightly or disagree strongly or slightly with that statement.

What are 15-24s' perceptions of different video media platforms?

06 Perceptions of Providers of TV Shows

Perceptions of Providers of TV Shows

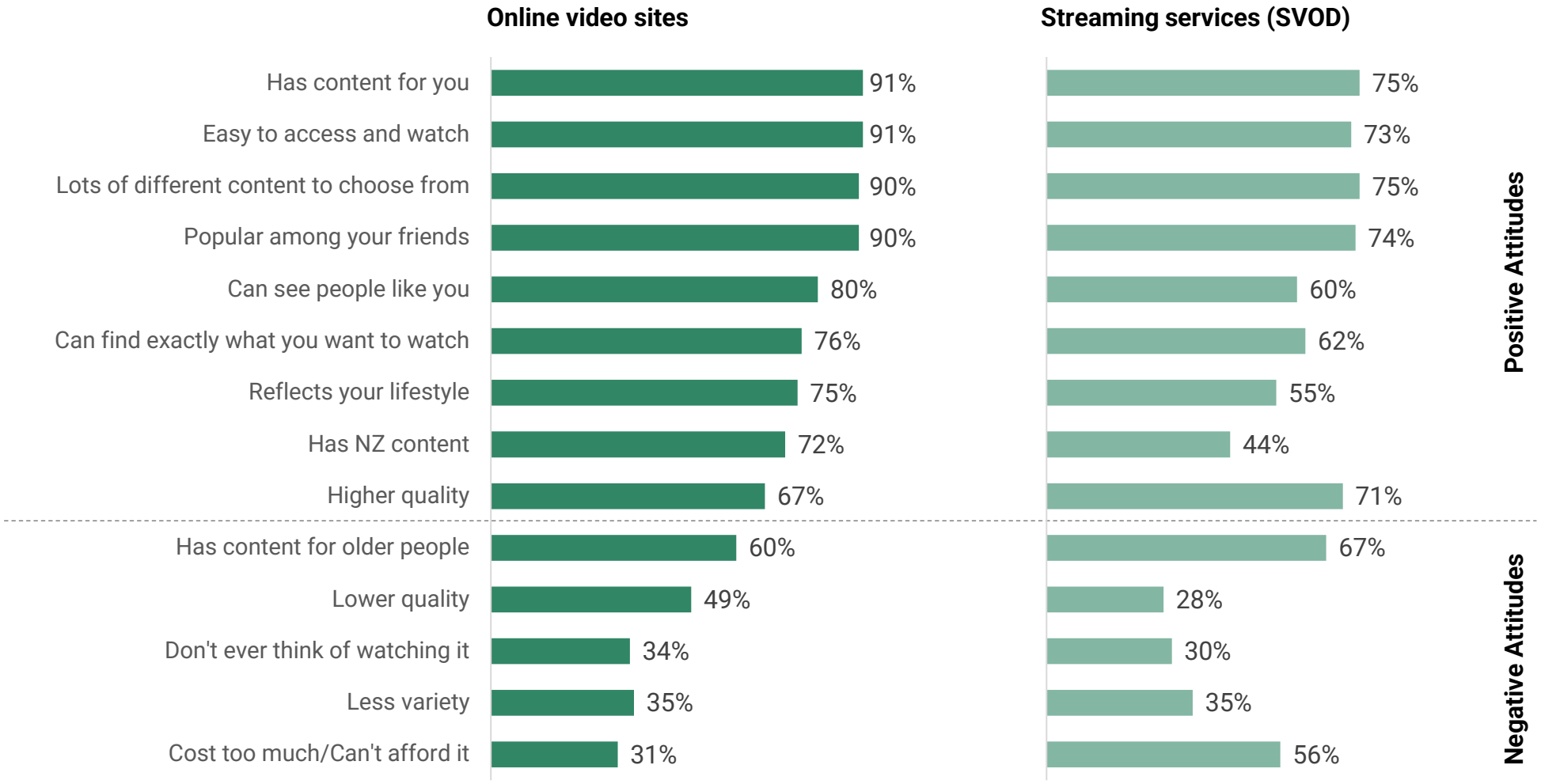
- All 15-24s
- % who agree slightly/strongly that each attribute is associated with each provider
- Ranked by perceptions of online video sites

Levels of positivity towards online video providers are very strong and will be influencing their perceptions of NZ providers.

Note:
To manage interview length, each respondent was shown a random selection of eight of the fifteen statements resulting in a reduced and variable sample size for each.

Nine in ten 15-24s believe online video sites have content for them, are easy to access, have a wide variety available and are popular among their friends– in fact at least two thirds associate every positive perception to online video providers, including having NZ content and higher quality.

Positivity is also strong for SVOD services but with more acknowledgement of weaknesses such as having content for older people, cost, and less NZ content. However it is perceived as higher quality.



Base: All 15-24 year olds (n=516)

Base: All 15-24 year olds (n=495)

Q For each one please tell me how much you agree or disagree that describes each provider of TV shows

Perceptions of Providers of TV Shows

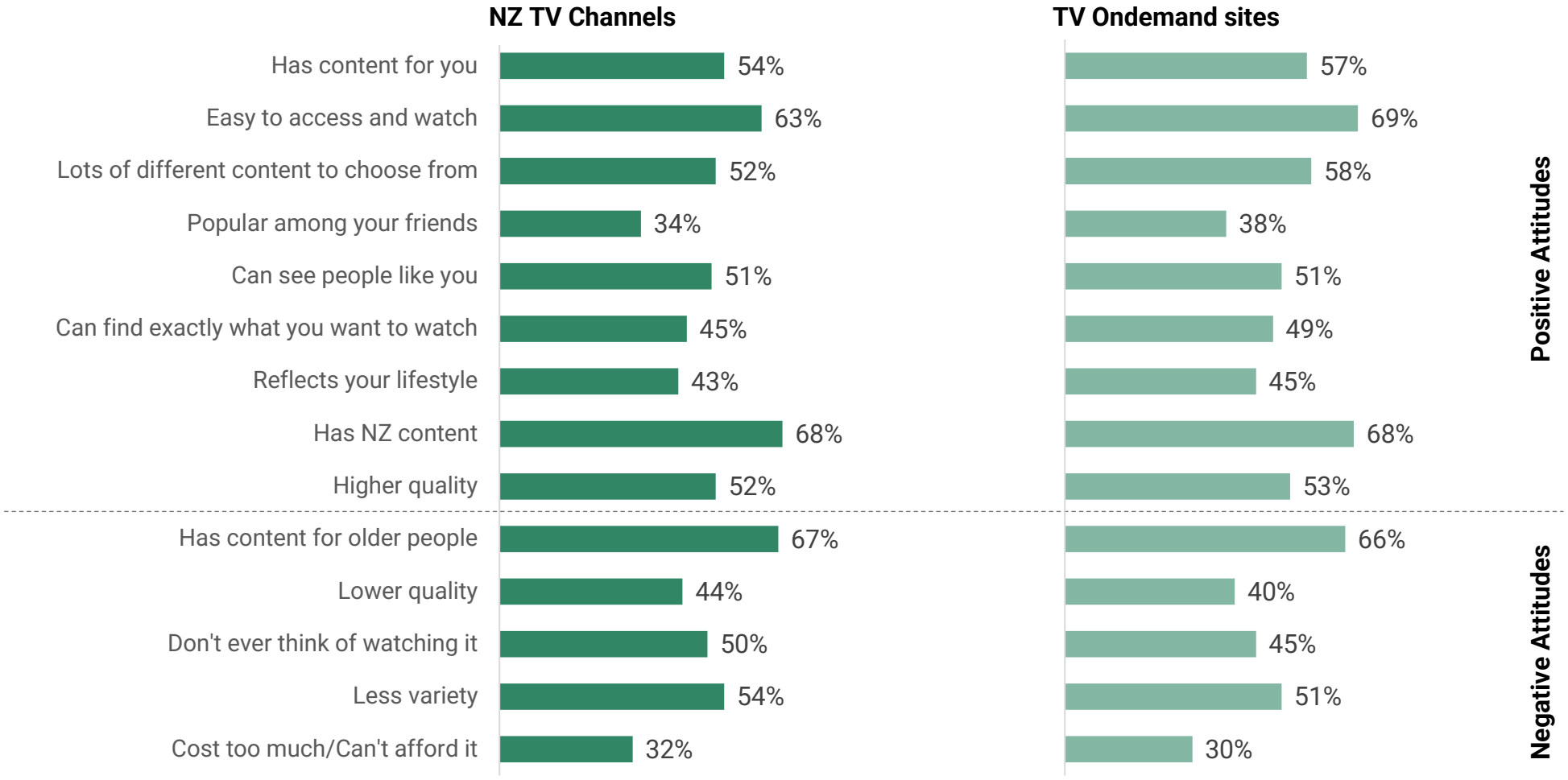
- All 15-24s
- % who agree slightly/strongly that each attribute is associated with each provider
- Ranked by perceptions of online video sites

Consistent across all attributes, 21-24 year olds and Aucklanders are more likely to hold positive perceptions of both NZ TV channels and ondemand sites.

Note:
To manage interview length, each respondent was shown a random selection of eight of the fifteen statements resulting in a reduced and variable sample size for each.

Levels of positivity NZ based video media are lower than for both online video and SVOD providers, with the strongest positive associations being NZ content and ease of access. Incidence of negative associations are stronger particularly in terms of having content for older people and less variety. The overall effect of these perceptions will be having a strong influence on decisions to watch and opportunities to see NZ content.

Perceptions of NZ TV channels and ondemand sites are very similar, suggesting these perceptions are driven more by the source of content (ie. the provider/brand) than the media (ie. traditional vs digital) by which it is delivered.



Base: All 15-24 year olds (n=495)

Base: All 15-24 year olds (n=494)

Q For each one please tell me how much you agree or disagree that describes each provider of TV shows

How can we make 15-24s more aware of the NZ content targeted at them?

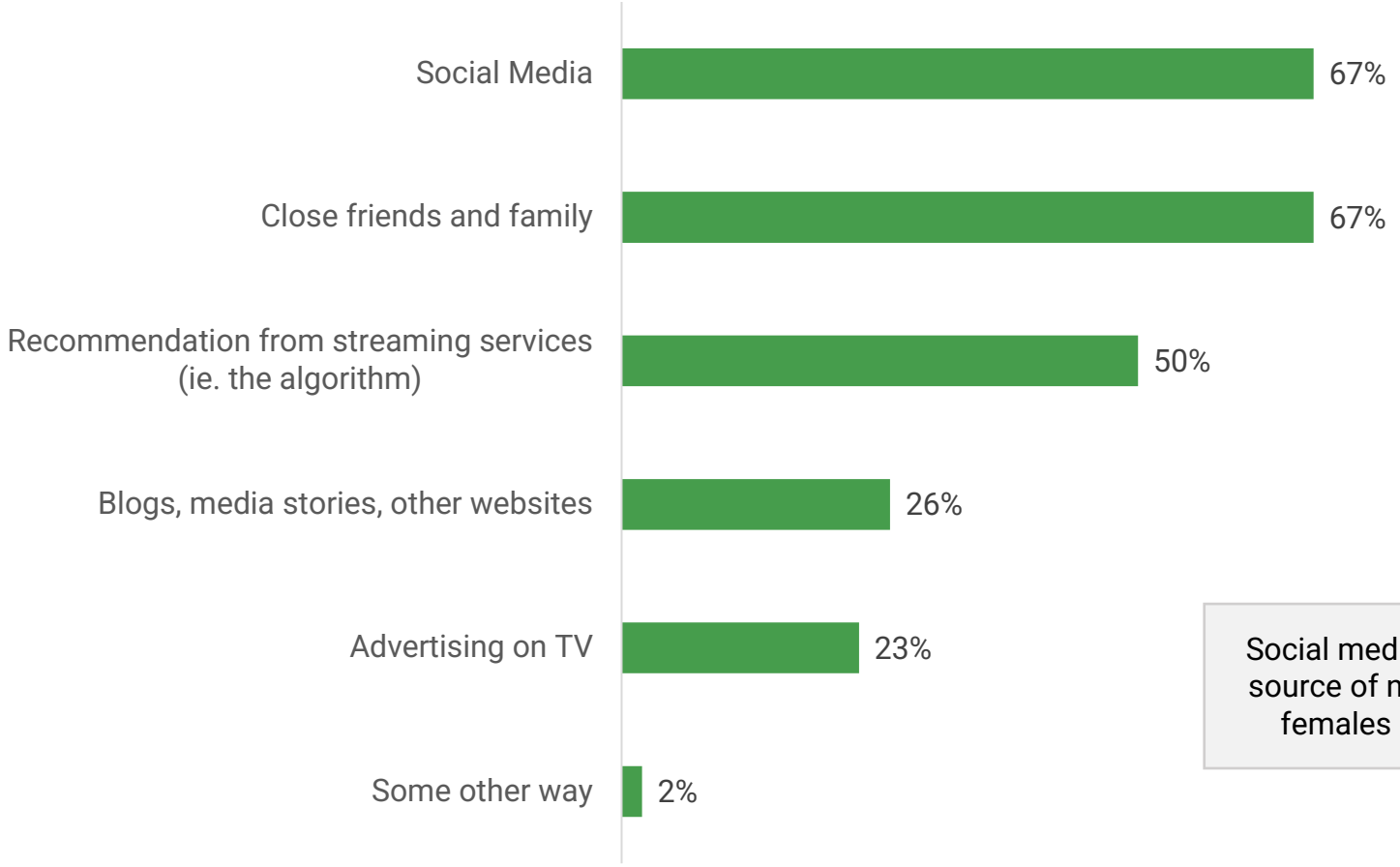
07

Sources of New Content

Sources of New Things To Watch

– All 15-24s

Word of mouth, whether from social media or social networks, is a source of new video content for two thirds of 15-24s. One in two also find new things to watch from recommendations suggested to them by their streaming services.



Social media is more likely to be a source of new things to watch for females (73% cf 61% males).

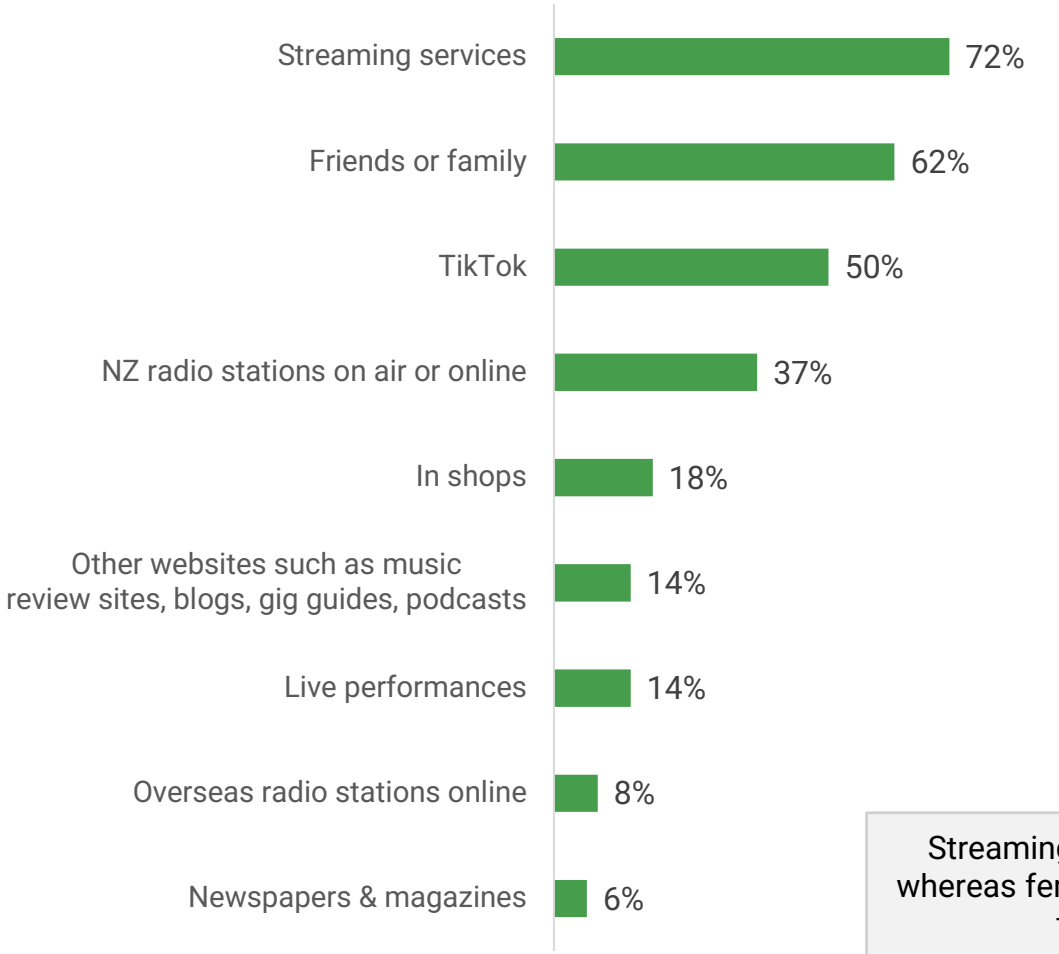
Base: All 15-24 year olds (n=706)

Q Thinking about shows that can be watched on streaming services like Netflix or Disney Plus, or on TV channels such as TVNZ 2, Three or SKY, in which of the following ways do you usually find out about new things to watch?

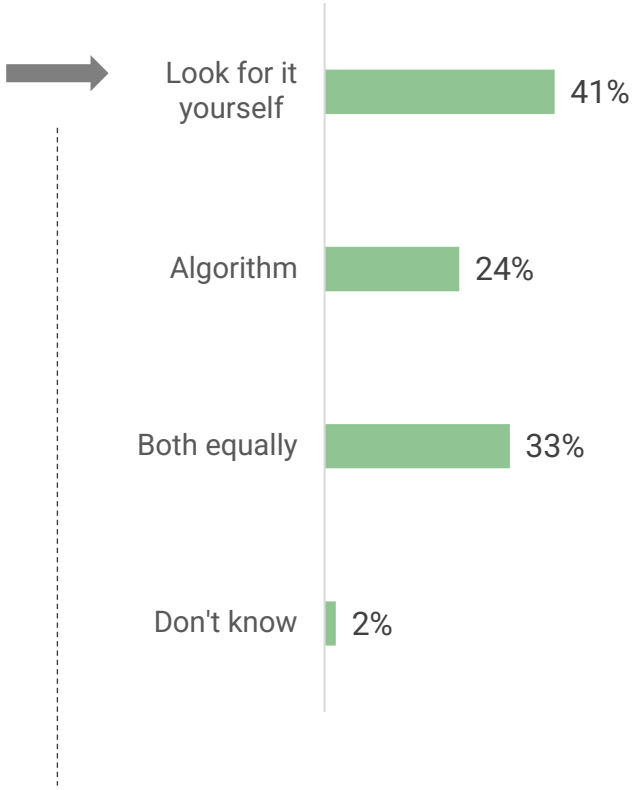
Sources of New Music

– All 15-24s

Streaming services are the most common source of new music among 15-24s, with looking for it themselves slightly more common than simply relying on the algorithm. Word of mouth from friends and family is next most common, followed by TikTok, and NZ radio stations used by one in three 15-24s.



Base: All 15-24 year olds (n=706)



Streaming services and friends/family are used equally by all 15-24s, whereas females are more likely to use TikTok, and males are more likely to use other websites and overseas radio stations.

Base: Use algorithm from streaming services to find new music (n=506)

Q In which of the following ways, if any, do you usually find out about new music?
Q: When you find new music on streaming services, do you mostly use the service's algorithm to make recommendations, or do you look for new music yourself?

What aspects of NZ content appeal the most to 15-24s?

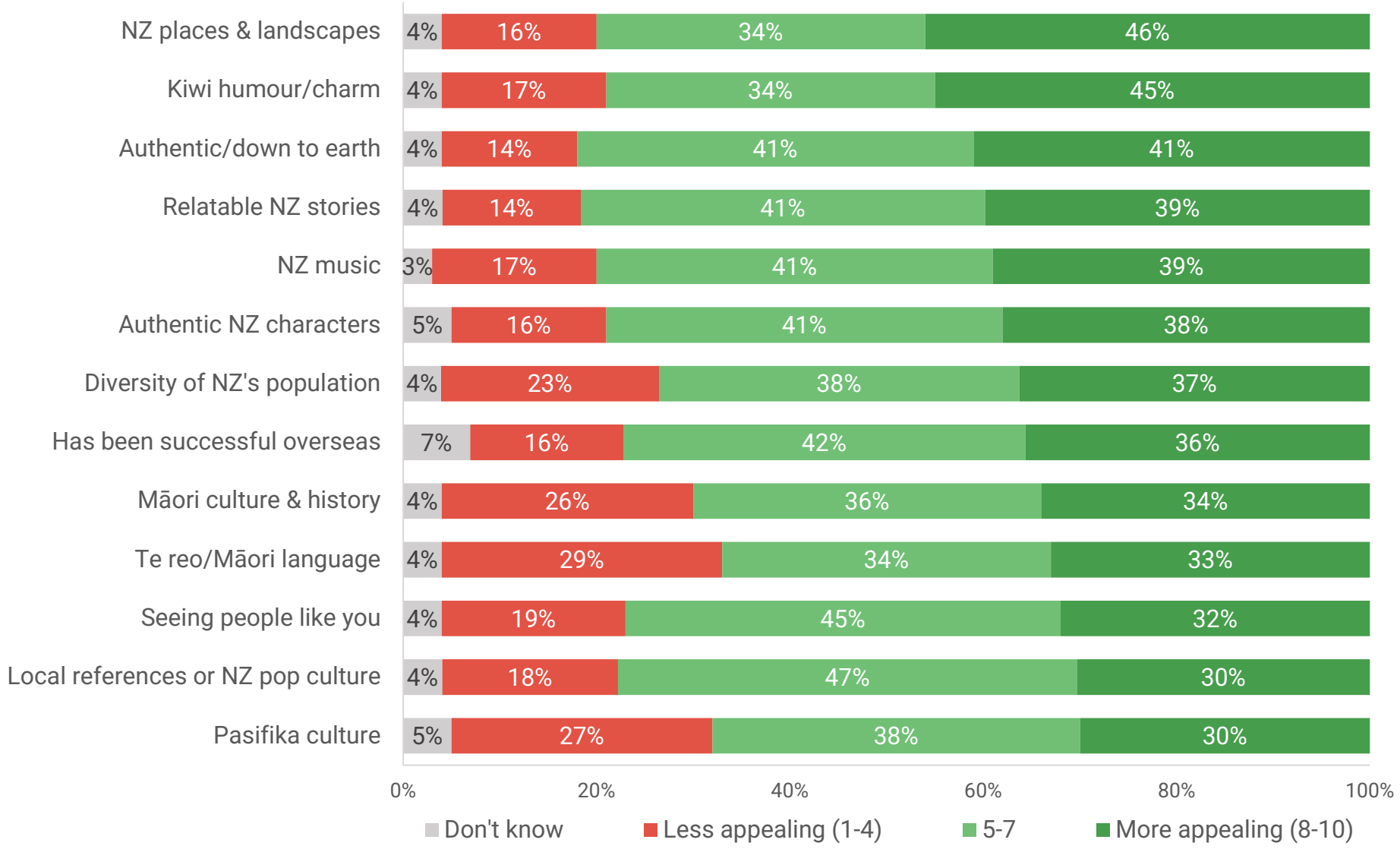
08

Appeal of Kiwi cues

Appeal of Kiwi Cues

- All 15-24s
- Ranked by % rated 8-10

All Kiwi cues appeal to most 15-24s to some extent – none are unappealing to more than three in ten. In particular, NZ places and landscapes, and kiwi humour have the greatest appeal.



For nearly all cues, the following subgroups are more likely to find each appealing:

- 18-24s
- Aucklanders
- Māori
- Pasifika

Base: All respondents(n=532-567)

Note:
To manage interview length, each respondent was shown a random selection of seven of the thirteen statements resulting in a reduced and variable sample size for each.

Q Thinking about NZ shows, on a scale of 1 to 10 where 1 means not at all appealing and 10 means very appealing, please tell me how appealing each of the following is in terms of encouraging you to watch NZ shows.

What devices and services do 15-24s have access to that enable consumption of different media?

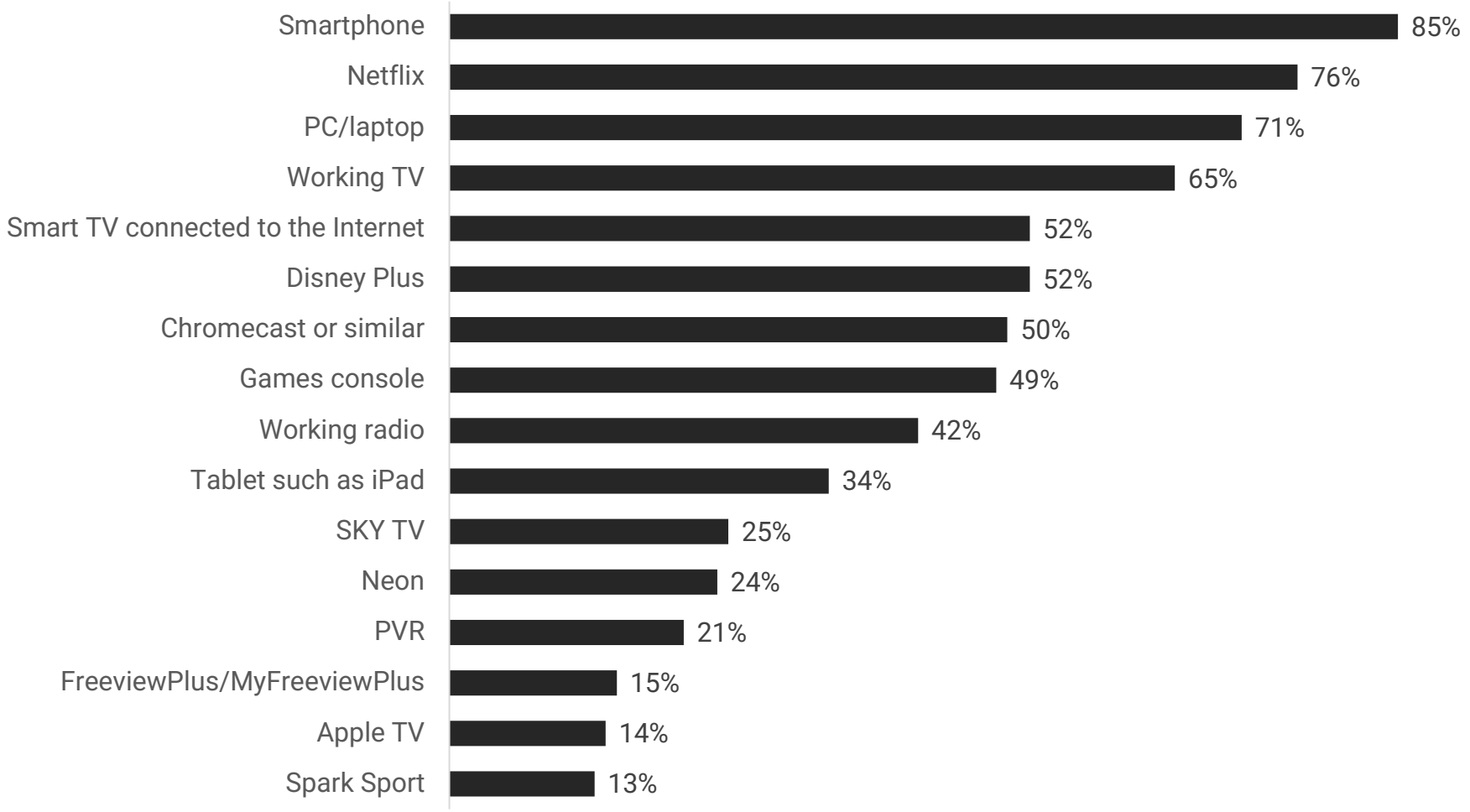
09

Access to Services and Devices

Access to Devices and Services

– All 15-24s

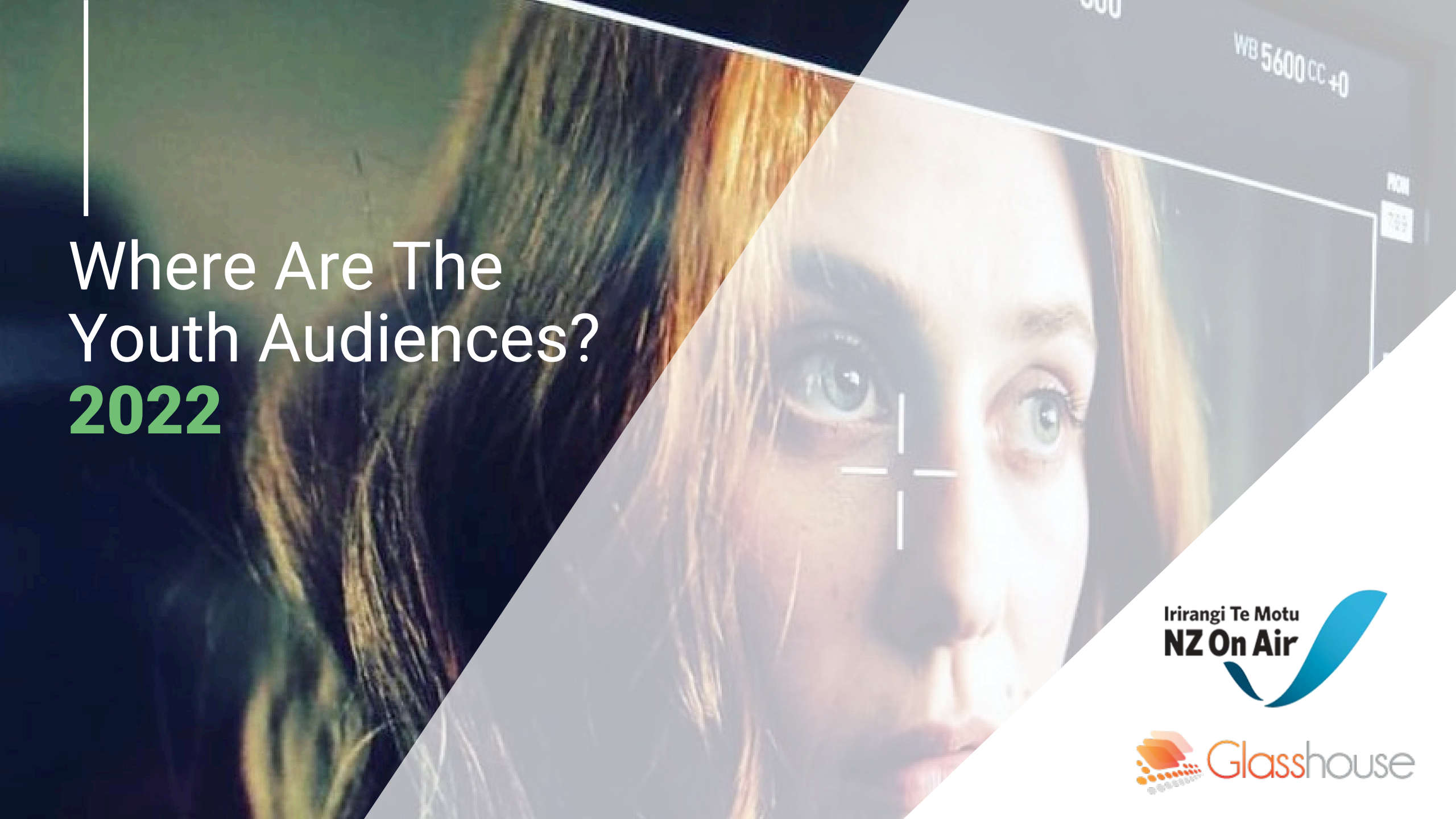
Nearly all have a smartphone, but few have a tablet. Three quarters of 15-24s have access to Netflix. Access to a TV is not a hindrance to viewing for most 15-24s as two thirds have access to one. However the incidence of SKY TV – a known driver of TV viewing – is low at 25%. Note that 80% of 15-24s with access to a TV have a smart TV that is connected to the Internet.



Base: All 15-24 year olds (n=706)

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

Where Are The Youth Audiences? 2022



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NZ On Air

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